



# Smarter Balanced Assessment Consortium

## Administration and Registration Tools User Guide



## CONTENTS

OVERVIEW OF THE ADMINISTRATION AND REGISTRATION TOOLS SYSTEM _____	5
Inter-relation between the Administration and Registration Tools System and other Smarter Balanced Systems _____	5
User Roles and Permissions _____	6
Understanding the Smarter Balanced Hierarchy _____	8
About Microsoft Excel Files _____	10
INTRODUCTION TO THIS USER GUIDE _____	11
CHECKLIST FOR TEST REGISTRATION ADMINISTRATORS _____	12
ACCESSING THE ADMINISTRATION AND REGISTRATION TOOLS SYSTEM _____	14
Logging on to ART _____	14
Switching Between Smarter Balanced Systems (Single Sign On System) _____	14
UNDERSTANDING THE ART INTERFACE _____	15
ART Home Screen _____	15
ASSESSMENT TASKS _____	17
Select Tests from the Test Specifications Bank (TSB) _____	17
Sort the TSB search results. _____	18
Update a test from the TSB _____	19
Managing an Assessment _____	20
Setting assessment attributes. _____	20
Understanding test eligibility rules. _____	23
Explicit eligibility rules. _____	23
Implicit eligibility rules. _____	23
Understanding test windows, delay, and opportunities. _____	23
Understanding test windows and time zones. _____	24
Modifying assessments _____	25
Searching for assessments. _____	25
Understanding the search results table on the Test Search screen. _____	26
Modifying an assessment. _____	26
Exporting assessments _____	27
Export all assessments. _____	27
Export selected assessments. _____	27
Delete Assessments _____	27
REGISTRATION TASKS _____	28

Creating and Modifying Records in ART .....	28
File Uploads. ....	28
Download File Templates .....	29
Creating an Upload File. ....	30
Uploading Files. ....	31
Creating/Modifying Individual Records. ....	34
About Data Columns and Edit Fields. ....	37
Managing Records .....	38
Managing State Groups. ....	38
Create or modify state groups. ....	38
Upload state groups. ....	39
Managing States. ....	40
Create or modify states. ....	40
Upload states. ....	41
Managing District Groups. ....	43
Create or modify district groups. ....	43
Upload district groups. ....	44
Managing Districts. ....	46
Create or modify a district. ....	46
Upload districts. ....	47
Managing Institution Groups. ....	49
Create or modify institution groups. ....	49
Upload institution groups. ....	50
Managing Institutions. ....	52
Create or modify an institution. ....	52
Upload Institutions. ....	53
Managing Personnel. ....	55
Create or modify a personnel record. ....	55
Upload personnel. ....	57
Managing Students. ....	59
Create or modify a student. ....	59
Upload students. ....	60
Managing Student Groups. ....	66
Create or modify a student group. ....	66
Upload student groups. ....	68

Managing Student Eligibility. _____	69
Managing Accommodations. _____	71
Create or modify a student's accommodations. _____	71
Upload accommodations. _____	72
APPENDIX A. MANAGE SYSTEM SETTINGS _____	78
Client Configuration _____	78
Manage Subjects _____	79
APPENDIX B. OPENING A CSV FILE IN EXCEL _____	81
APPENDIX C. COMMON ERRORS WITH FILE UPLOADS _____	82

## LIST OF FIGURES

Figure 1. Simple Smarter Balanced Hierarchy .....	8
Figure 2. Smarter Balanced Hierarchy with Groupings .....	9
Figure 3. Login Screen .....	14
Figure 4. ART Home Screen for the Client Role .....	15
Figure 5. Test Specifications Bank Search Screen .....	17
Figure 6. Test Specifications Bank Search Screen with Update Notification.....	19
Figure 7. Add/Modify Test Information screen .....	20
Figure 8. Effect of Test Windows, Delay, and Opportunities .....	24
Figure 9. Effect of Time Zones on Test Windows .....	24
Figure 10. Test Search Screen with Search Results Table .....	25
Figure 11. Download Templates screen.....	29
Figure 12. Sample Template for District Records.....	30
Figure 13. Upload File, Step 1: Choose the File.....	31
Figure 14. Upload File, Step 2: Preview Records.....	32
Figure 15. Step 3: Successful Validation .....	33
Figure 16. Failed Validation .....	33
Figure 17. Upload File, Step 4: Confirmation .....	34
Figure 18. Sample Create/Modify [Record Type] Screen.....	35
Figure 19. Comparison Between Labels for Edit Fields and Data Columns .....	37
Figure 20. Group of States Search Screen.....	38
Figure 21. State Search Screen .....	40
Figure 22. Group of Districts Search Screen.....	43
Figure 23. District Search Screen .....	46
Figure 24. Institution Group Search Screen.....	49
Figure 25. Institution Search Screen .....	52
Figure 26. Personnel Search Screen .....	55
Figure 27. Student Search Screen.....	59
Figure 28. Student Group Search Screen .....	66
Figure 29. Add Student Group Information Screen .....	67
Figure 30. Eligible Assessments section on the Edit Student Information Screen .....	70
Figure 31. Accommodations section on the Edit Student Information Screen.....	71
Figure 32. Client Configuration Screen .....	78
Figure 33. Subjects Table.....	79
Figure 34. Add Subject Information Screen .....	80
Figure 35. Merge Subject Screen .....	80
Figure 36. Sample Error Message .....	82

## OVERVIEW OF THE ADMINISTRATION AND REGISTRATION TOOLS SYSTEM

The Administration and Registration Tools (ART) system manages registrations of students for assessments. ART also allows authorized users to create and manage records for students, personnel, and entities such as states, districts, and institutions. You can upload records in groups or manage them individually in ART. You may also manage the assessments settings and accommodation information for students.

### Inter-relation between the Administration and Registration Tools System and other Smarter Balanced Systems

ART has connections to the following Smarter Balanced systems.

- **Single Sign On (SSO):** This system is responsible for user authentication and authorization, and allows you to log in to the Smarter Balanced systems provided by the American Institutes for Research (AIR). After logging in, you can switch between systems without logging in and out of each individual system. Users added through ART are automatically added to SSO, and users added to SSO can log in to ART.
- **Program Management:** This system stores information about the tenants who have subscribed to the Smarter Balanced systems. When logging in to ART, only users who are associated with tenants in good standing are allowed access.
- **Permissions:** This system stores the list of roles and associated permissions to ART features. When you sign on to ART, Permissions checks your role, and gives you access to those features associated with your role. For additional information about permissions, see the [User Roles and Permissions](#) section.
- **Consortium Data Warehouse:** This system stores registrations and results for assessments, and other information shared among Smarter Balanced members.
  - If a state does not wish to share identifying student information, then that state must provide its own local data warehouse.
- **Test Authoring System:** This system constructs the tests for which students are registered in ART. Tests created in the Test Authoring System are stored as test packages in the **Test Specifications Bank**.
- **Test Delivery System (TDS):** This system delivers assessments to the students. TDS delivers only those tests for which a student is registered through ART.

## User Roles and Permissions

ART restricts access to certain tasks based on your designated role. You can access the data stored in ART, and perform tasks based on your permissions. [Table 1](#) lists the standard roles in ART.

Table 1. Standard ART User Roles

User Role	Description
<b>Test Registration Administrator</b>	Test Registration Administrators can import and modify assessments. They can also create Client Coordinator users.
<b>Client Coordinator</b>	Client Coordinator can create State Coordinator, District Coordinator, School Coordinator, and Test Administrator accounts. They can upload data across all states, districts, and institutions that belong to the same client.
<b>State Coordinator</b>	State Coordinators can create other State Coordinator accounts as well as District Coordinator, School Coordinator, and Test Administrator accounts. They can upload data across all districts and institutions within their states.
<b>District Coordinator</b>	District Coordinators can create other District Coordinator accounts as well as School Coordinator and Test Administrator accounts. They can upload data across all institutions within their districts.
<b>School Coordinator</b>	School Coordinators can create other School Coordinator and Test Administrator accounts. They are able to upload data for their institution only.
<b>Test Administrator</b>	Test Administrators can search for, view, and change students and accommodations. They can change accommodations with the <b>Create/Modify Students</b> task, but not through file uploads. They can also deliver summative assessments.
<b>Interim Test Administrator</b>	Interim Test Administrators can search for, view, and change students and accommodations. They can change accommodations with the <b>Create/Modify Students</b> task, but not through file uploads. They can also deliver formative and interim assessments.

For each of the user roles listed in [Table 1](#), there are associated permissions. [Table 2](#) lists the permissions associated with the standard ART user roles.

Table 2. User Roles and Associated Permissions

Permissions	School Coordinator	District Coordinator	State Coordinator	Client Administrator	Test Reg. Admin	Test Admin	Interim Test Admin
Accommodations Modify	✓	✓	✓	✓		✓	✓
Accommodations Read	✓	✓	✓	✓		✓	✓
Accommodations Upload	✓	✓	✓	✓			
Assessment Import					✓		

# Administration and Registration Tools User Guide

Permissions	School Coordinator	District Coordinator	State Coordinator	Client Administrator	Test Reg. Admin	Test Admin	Interim Test Admin
Assessment Modify					✓		
Assessment Read	✓	✓	✓	✓			
Client Administrator					✓		
Eligibility Upload	✓	✓	✓	✓			
Entity Modify	✓	✓	✓	✓			
Entity Read	✓	✓	✓	✓			
Entity Upload	✓	✓	✓	✓			
Student Modify	✓	✓	✓	✓			
Student Read	✓	✓	✓	✓			
Student Upload	✓	✓	✓	✓			
StudentGroup Modify	✓	✓	✓	✓		✓	✓
StudentGroup Read	✓	✓	✓	✓		✓	✓
StudentGroup Upload	✓	✓	✓	✓			
Template Download	✓	✓	✓	✓			
User Modify	✓	✓	✓	✓			
User Profile Modify						✓	✓
User Read	✓	✓	✓	✓		✓	✓
User Upload	✓	✓	✓	✓			
Warehouse Extract Admin					✓		
Eligibility Extract					✓		



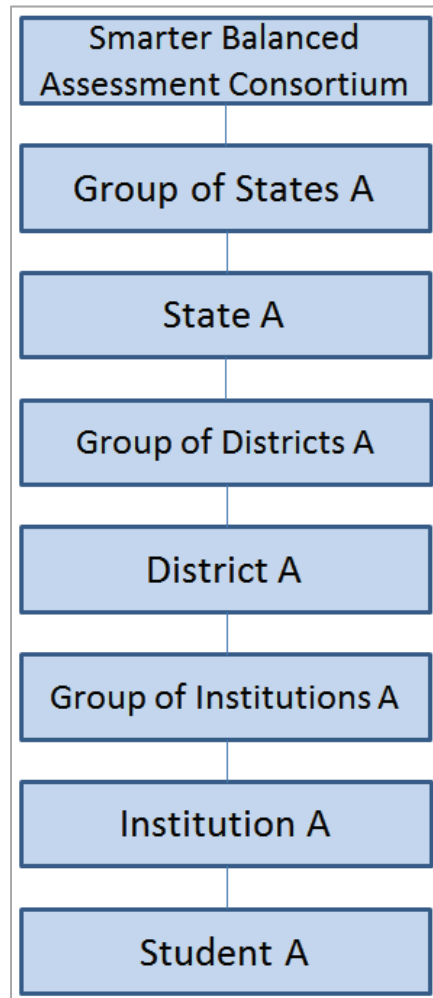
## Understanding the Smarter Balanced Hierarchy

The Smarter Balanced hierarchy organizes students and entities. For the purposes of this user guide, the term “entity” refers to institutions, groups of institutions, districts, groups of districts, states, and groups of states. [Figure 1](#) provides a simple hierarchy. In this case, a student attends an institution, the institution is in a group of institutions, the group of institutions is in a district, the district is in a group of districts, the group of districts is in a state, the state is in a group of states, and the group of states is a member of the Smarter Balanced consortium. You may construct hierarchies with different structures as well.



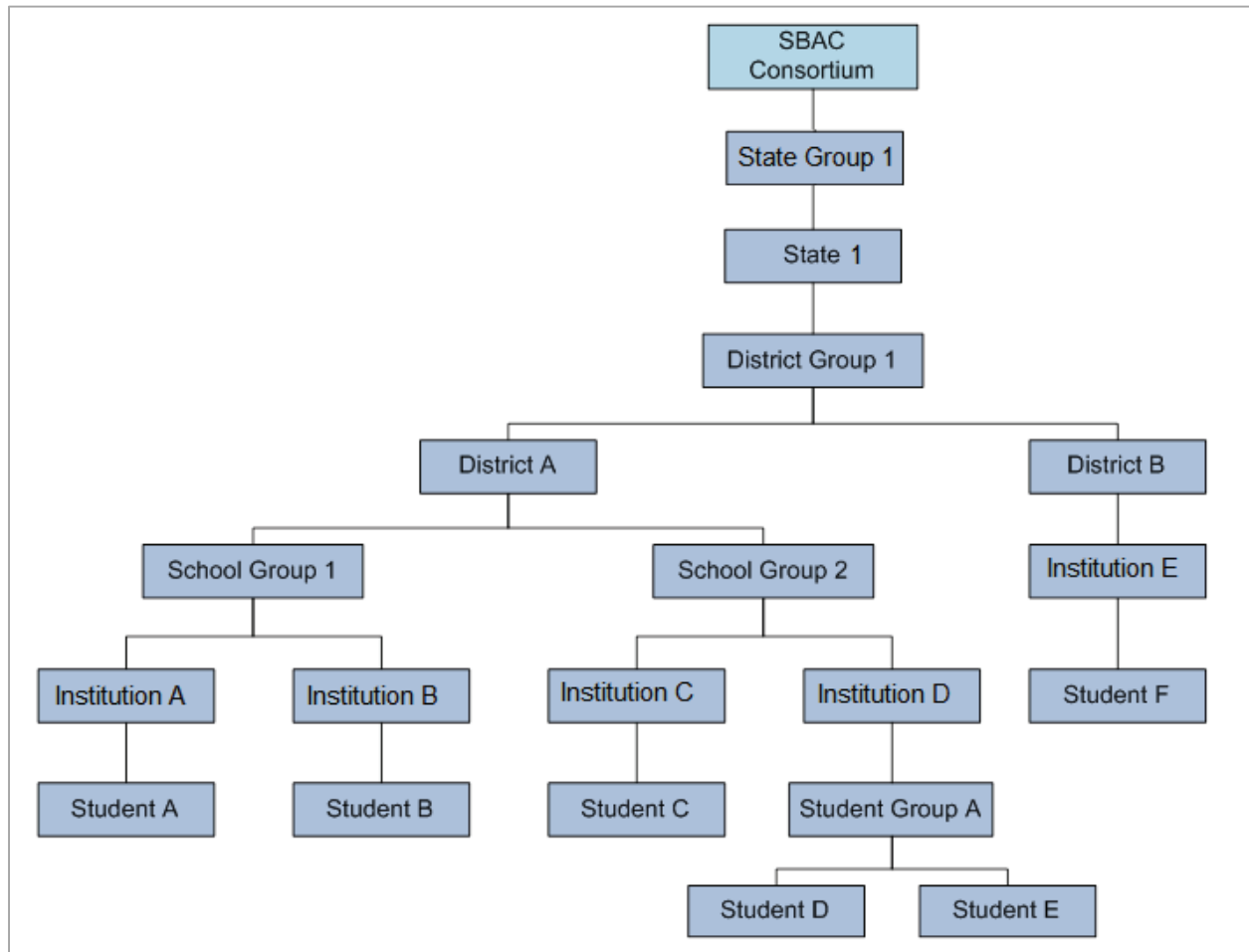
You can rename any of these entity levels. For example, you may choose to rename “Institution” and “Group of Institutions” as “School” and “Group of Schools,” respectively.

Figure 1. Simple Smarter Balanced Hierarchy



In a more complex example, there can be groups of students within institutions, groups of institutions within districts, groups of districts within states, and groups of states within the Smarter Balanced consortium. See [Figure 2](#).

Figure 2. Smarter Balanced Hierarchy with Groupings



The following rules apply when designing hierarchies:

- An entity or student must have only one “parent.” The parent is the entity to which another entity, user, or student belongs. For example, a student can attend only one institution, an institution can be in only one district, and a district can be in only one state.
- An entity (excluding students or student groups) must be the “child” of an upper-level entity. The child is the student, user, or entity that belongs to another entity. For example, an institution can be the child of any entity from institution group to state; a district can be the child of a district group or a state.
- A student or student group must be the child of an institution.
- All relationships are limited by permissions. For example, a user at the institution level cannot add students or entities to the district level, but a user at the district level can add students to institutions within that district.

## About Microsoft Excel Files

The Administration and Registration Tools System allows you to upload files in one of two formats: .csv and .xlsx. Your version of Excel impacts the file format you should select or use.

### **CSV (comma-separated values):**

If you have Excel 2003 or earlier, AIR recommends that you download exported records in .csv format. CSV files do not automatically preserve leading zeros (numbers that begin with at least one zero at the beginning, e.g., 0001234). Therefore, to ensure that student data (especially SSIDs) appear in Excel correctly when using the .csv file, follow the instructions in [Appendix B: Opening a CSV File in Excel](#).

### **Excel:**

Microsoft Excel 2007 .xlsx files automatically preserve leading zeros. Excel 2007, 2010, or 2013 must be used to correctly open these files. These files cannot be opened using an earlier version of Excel.

## INTRODUCTION TO THIS USER GUIDE





This user guide provides information about using ART to create and manage assessment registrations. This introduction describes the contents of this document and includes a key for identifying icons and elements.

This user guide includes the following sections:

- [Accessing the](#) explains how to log in to ART.
- [Understanding the ART Interface](#) describes the overall layout of the ART interface.
- [Assessment Tasks](#) explains how to select, create, and manage assessments.
- [Registration Tasks](#) describes how to create and manage assessment registrations, as well as how to create various personnel, student, student group, and institution records.
- [Appendix A. Manage System Settings](#) explains how to configure system settings and manage subjects.
- [Appendix B. Opening a CSV File in Excel](#) explains how to open comma-separated value files in Excel.
- [Appendix C. Common Errors with File Uploads](#) explains how to resolve some common errors that may occur while uploading files in ART.

[Table 3](#) describes icons and typographical elements that appear in this user guide.

Table 3. Key Icons and Elements

Icon	Description
	<b>Warning:</b> This symbol appears with text that contains extremely important information regarding actions that may cause errors.
	<b>Caution:</b> This symbol appears with text that contains important information regarding a task.
	<b>Note:</b> This symbol appears next to text that contains helpful information or reminders.
	Text that appears in gray boxes provides instructions relevant to the task described. <ul style="list-style-type: none"> <li>• Numbered (ordered) lists provide step-by-step instructions.</li> <li>• Bulleted lists provide instructions that do not need to be done in a specific order.</li> </ul>
[Text]	Text in brackets is used to indicate a link or button that is clickable.
<b>Text</b>	Text in bold italics indicates a screen name.
<i>Text</i>	Text in italics indicates field names or labels.
"Text"	Text in quotation marks indicates the value specified for a field.

## CHECKLIST FOR TEST REGISTRATION ADMINISTRATORS

The following checklist provides a summary of the essential tasks involved in the assessment configuration workflow. Test Registration Administrators must complete each of these tasks in order to properly set up the assessments for which students are registered in ART. These tasks are described in greater detail in their respective system user guides.



This checklist includes steps that you must complete in other Smart Balanced systems. These systems' user guides may also include a checklist of the steps required to complete the respective workflow. Please refer to each system's user guide for a complete list of steps that you must complete before setting up tests in ART.

### Before accessing ART, you must do the following:

- ☐ In the Test Authoring System (TAS), construct a preliminary test, including segments and forms. For more information about constructing tests, refer to the TAS user guide.
- ☐ If the test includes adaptive segments, in the CAT Simulator System, run a simulation of the test package to ensure that the adaptive segments are functioning properly. For more information about running test simulations, refer to the CAT Simulator user guide.
- ☐ In TAS, publish the test package to the Test Specifications Bank. For more information about publishing tests, refer to the TAS user guide.

### In ART, you must do the following:

- ☐ On the **Client Configuration** screen, set a time zone for your client and select the assessment type(s) to be delivered in TDS. For more information, see [Appendix A. Manage System Settings](#).
- ☐ On the **Manage Subjects** screen, add the necessary subject code(s) associated with the assessment. For more information, see [Appendix A. Manage System Settings](#).
- ☐ Select a test to add to ART from the Test Specifications Bank. For more information on selecting tests, see the section [Select Tests from the Test Specifications Bank \(TSB\)](#).
- ☐ Set the assessment attributes. This step includes several sub-steps:
  - ☐ Set the delay rules for the assessment. For more information on delay rules, see the section [Understanding test windows, delay, and opportunities](#).
  - ☐ Set up at least one test window for the assessment. For more information on test windows, see the section [Understanding test windows, delay, and opportunities](#).
  - ☐ Set the total opportunities for each test window and the total global test opportunities for the assessment. For more information on test windows, see the section [Understanding test windows, delay, and opportunities](#).
  - ☐ Select an eligibility type for the assessment. For more information on eligibility types, see the section [Understanding test eligibility rules](#).

# Administration and Registration Tools User Guide

- If you selected “Implicit” as the eligibility type, then you must create the implicit eligibility rules for the assessment. If you did not select “Implicit” as the eligibility type, then you may skip this step. For more information on setting implicit eligibility rules, see the section [Implicit eligibility rules](#).

## ACCESSING THE ADMINISTRATION AND REGISTRATION TOOLS SYSTEM

This section contains information about how to log on to ART, how to reset a forgotten password, and how to switch between other Smarter Balanced systems.

### Logging on to ART

To access the Administration and Registration Tools System, you must have an authorized username and password. Since the Administration and Registration Tools System is an open-source system, your system administrator will be responsible for setting up your user account and providing you the login credentials.

*To log in to the Administration and Registration Tools System:*

1. Open your web browser and navigate to the Test Registration System using the URL provided to you. You will be directed to the Single Sign On Login screen.
2. In the *Username* field, enter your username.
3. In the *Password* field, enter your password.
4. Click [**Log In**]. You will be directed to the Administration and Registration Tools System home screen, provided your login is authenticated.

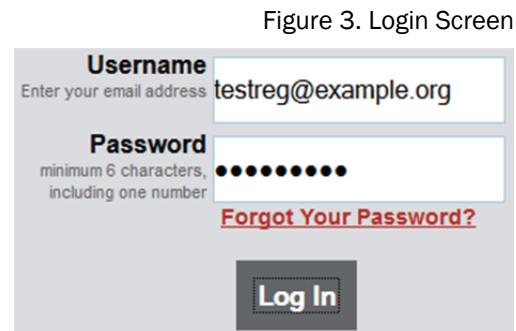


Figure 3. Login Screen

The login screen features two input fields. The first field is labeled 'Username' with a subtext 'Enter your email address' and contains the text 'testreg@example.org'. The second field is labeled 'Password' with a subtext 'minimum 6 characters, including one number' and contains ten black dots. Below the password field is a red link that says 'Forgot Your Password?'. At the bottom of the form is a dark button with the text 'Log In' in white.

### Switching Between Smarter Balanced Systems (Single Sign On System)

Smarter Balanced systems, including ART, use an integrated Single Sign On (SSO) system that allows users to log in one time and access all available applications. SSO integrates the following applications:

- Test Administrator (TA) Interface
- TA Training Site
- Online Reporting System
- Administration and Registration Tools System (ART)
- Test Authoring System (TAS)

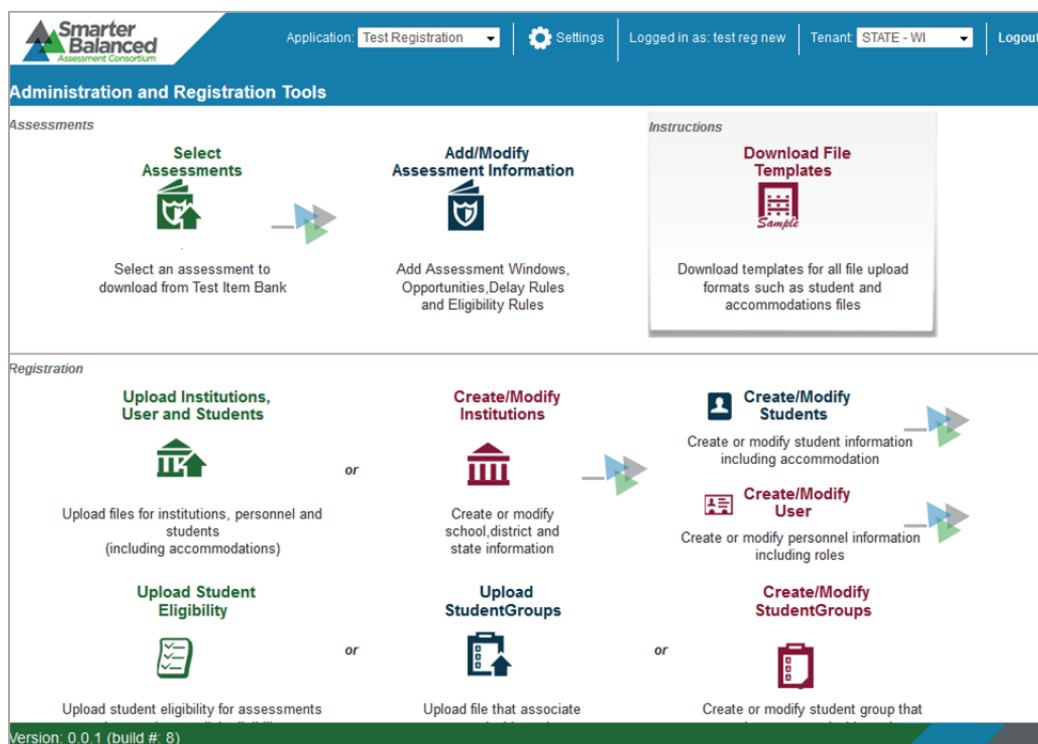
*Reminder: Access to all systems and their tasks and features is dependent on your user role.*

## UNDERSTANDING THE ART INTERFACE

### ART Home Screen

The first screen you see after logging in to ART is the ART home screen. You can click the button for a task to begin working on that task. The tasks that are available on the home screen depend on your user role. [Figure 4](#) displays the home screen for the Client Administrator role.

Figure 4. ART Home Screen for the Client Role



Do not have more than one ART browser tab or window open at one time. Changes made in one tab or window may overwrite changes made in another, resulting in loss of data.

The ART home screen provides brief directions for the required workflow. The triangle (→) symbols indicate precedence: you must complete a task to the left of the symbol before performing the task to the right. The “or” indicates a choice between one of the tasks. For instance you must upload institutions before you can create students or personnel, etc. Refer to [Figure 4](#) for examples of the following workflows:

### Modifying assessments

1. Select tests, then
2. Modify assessments.



## Uploading student groups

1. Upload institutions, then
2. Upload students, then
3. Upload personnel, then
4. Upload student group

Other workflows are available through the ART interface, as long as they follow the precedence indicated on the home screen.

The upper-right corner of the home screen displays the following information and links:

- *Application*—This drop-down list allows you to navigate between Test Registration and Test Administration tasks.
- [**Settings**]*—Click to configure system-wide settings and manage subjects. For information about these settings, see [Appendix A. Manage System Settings](#).*
- Your user name.
- *Tenant*—Your tenancy, the state or client associated with your logon.
- [**Logout**]*—Click to log out of the site.*

## ASSESSMENT TASKS

This section describes how to select and manage assessments. The overall process is as follows:

1. Select available tests or retrieve updated versions of tests from the Test Specifications Bank.
2. Assign settings to the assessment, such as test windows, number of opportunities, and eligibility rules.

### Select Tests from the Test Specifications Bank (TSB)

ART pulls available tests from the Test Specifications Bank (TSB). You can view which tests are available in the TSB, and then create assessment settings for them.


*Note: The actions described in this section are available only to Test Registration Administrators.*

Figure 5. Test Specifications Bank Search Screen

**Test Spec Bank Test Search**

**Search Filters**

Subject Code: 
Grade:

 **Search**

Save	Assessment Name ↑	Subject Code	Grade	Version	Flags	Update
<input checked="" type="checkbox"/>	CC-AL1-8-ADMIN-S-1	AL1	8	1.0	C	
<input checked="" type="checkbox"/>	CC-AL1-8-ADMIN-S-1	AL1	8	2.0	C	
<input checked="" type="checkbox"/>	CC-AL1-8-ADMIN-S-1	AL1	8	3.0	C	
<input checked="" type="checkbox"/>	CC-AL1-8-ADMIN-S-1	AL1	8	4.0	C	

Total results found: 6
Total results found: 0
Page:

To select a test from the TSB:

1. On the ART home screen, click [Select Tests]. The **Test Spec Bank Test Search** screen appears with a listing of tests.
2. To filter the listing, do the following:
  - a. In the *Subject Code* and *Grade* filter fields, enter values by which you want to filter the search results.
  - b. Click [Search]. ART displays the matching tests available in the TSB.
3. To add a test to your assessment pool, click [ ☒ ] in the Save column.

[Table 4](#) describes the fields in the TSB test search results table.

Table 4. Fields in the TSB test search results table

Column	Description
Save	If a check <input checked="" type="checkbox"/> button appears in this column, you can save this test in your assessment pool.
Assessment Name	Name of the test.
Subject Code	Abbreviated subject code associated with the test.
Grade	Grade or grades to which the assessment is administered.
Version	Most recent version of the test. The version number is in x.x format, where the number before the decimal point is the major version number and the number after the decimal point is the minor version number.
Flags	Test's status compared to the version in the TSB. <ul style="list-style-type: none"> <li>• E: The latest version of the test is already in ART.</li> <li>• C: The latest version of the test has not been imported into ART yet.</li> <li>• U: The test exists in ART but a newer version is available in the TSB.</li> </ul>
Update	If a check <input checked="" type="checkbox"/> button appears in this column, the version in the TSB is more recent than the one in ART.

## Sort the TSB search results.

To sort the TSB search results:

1. On the **Test Spec Bank Test Search** screen (see [Figure 5](#)) click a column header. ART sorts the results by the selected attribute in ascending order. A double arrow (↕) icon indicates the currently sorted column.
2. To sort the results in the opposite order, click the column header again.

## Update a test from the TSB

Users of the Test Authoring System may release new versions of a test. When that happens, a check (☒) appears in the Update column. Referring to [Figure 6](#), the version for the “CC-REA-5-TIMTEST-I-1” test in Test Authoring System is newer than the one in ART.

Figure 6. Test Specifications Bank Search Screen with Update Notification

Save	Assessment Name ↑	Subject Code	Grade	Version	Flags	Update
<input checked="" type="checkbox"/>	CC-REA-5-TIMTEST-F-1	REA	5	3.1	C	
	CC-REA-5-TIMTEST-I-1	REA	5	1.0	E	
	CC-REA-5-TIMTEST-I-1	REA	5	1.1	U	<input checked="" type="checkbox"/>

When you update a test version, ART replaces the old version of the test with the new version. Any assessments that you designed with the old version will now have the new version.

To update a test from the TSB:

- In the Update column of the *Test Specifications Bank Search* table, click [ ☒ ].

This section describes how to manage assessment attributes, and discusses details that impact an assessment, such as eligibility rules, test windows, and time zones.



## Setting assessment attributes.

Figure 7. Add/Modify Test Information screen

To set assessment attributes:


1. In the *Total Global Opportunities* field, enter the number of opportunities a student has to take the test across all of the test windows.
2. From the *Eligibility Type* drop-down list, select “IMPLICIT” or “EXPLICIT,” depending on the rules used to determine which students are eligible to take the test. (For an explanation of implicit and explicit eligibility, see the [Understanding test eligibility rules](#) section.)
3. In the *Academic Year* field, enter the ending year of the academic year for the assessment.

To set test window information:

1. In the *Test Windows* section, click [  ]. A new row for defining a test window appears.
2. In the *Start Date* and *End Date* fields, click the calendar [  ] icon and select dates from the calendar windows that pop up.
3. In the *Total Opportunities* field, enter the number of test opportunities for this window. *Note: This step is available only if you add more than one test window.*
4. To add additional test windows, repeat steps [1–3](#) as required.

To set rules for implicit eligibility:

*Note: These instructions only apply if you selected “Implicit” as the assessment’s eligibility type.*

1. In the *Implicit Eligibility Rules* section, click [  ]. A new row for defining a test eligibility rule appears.
2. From the *Rule Field* drop-down list, select one of the available fields.
3. From the *Operator* drop-down list, select one of the operators (if available).
4. From the *Value* drop-down list, select one of the available values.
5. From the *Rule Type* drop-down list, select one of the following:
  - “ENABLER”—select if the student must satisfy this condition to take the test.
  - “DISABLER”—select if the student must not satisfy this condition to take the test.
6. To add additional eligibility rules, repeat steps [1–5](#) as required. ART automatically registers for the assessment those students who meet the eligibility rules.

To save the assessment attributes:

1. Click [**Save**] at the bottom of the screen. ART saves the assessment in your assessment pool.

[Table 5](#) provides detailed information about the attribute fields in the **Add Test Information** screen.

Table 5. Fields in the Add Test Information screen

Field	Description
<b>Add Test Information</b>	
Identifier	Unique identifier for the selected test.
Name	Descriptive name for the selected test.
Subject Code	Subject code corresponding to the selected test.

# Administration and Registration Tools User Guide

Field	Description
Version	Version of the selected test.
Grade	Grade levels to which the selected test applies.
Total Global Opportunities	Total number of times a student can take this test across all of the test windows. For additional information about this field, see the section <a href="#">Understanding test windows</a> .
Delay Rule	Number of calendar days between test opportunities. For additional information about this field, see the section <a href="#">Understanding test windows</a> .
Eligibility Type	<p>Method by which eligibility for an assessment is determined.</p> <ul style="list-style-type: none"> <li>• “Implicit”—The list of students eligible to take this test is implicitly derived from a set of criteria.</li> <li>• “Explicit”—The list of students eligible to take this test comes from a file upload.</li> </ul> <p>For an explanation of these rules, see the section <a href="#">Understanding test eligibility rules</a>.</p>
Academic Year	Calendar year in which the academic year ends. For example, if the academic year is 2014–2015, the value in this field is “2015.”
<b>Test Windows</b>	
Start Date	Date when the test window starts.
End Date	Date when the test window ends.
Total Opportunities	<p>Number of times student can take this test during the test window.</p> <ul style="list-style-type: none"> <li>• If you have one test window, ART sets the Total Opportunities to be equal to Total Global Opportunities.</li> <li>• If you have more than one test window, the sum of all Total Opportunities fields must be greater than or equal to the Total Global Opportunities.</li> </ul> <p>For example, if Total Global Opportunities is 3, then the sum of all Total Opportunities for all test windows must be greater than or equal to 3. For additional information about this field, see the section <a href="#">Understanding test windows</a>.</p>
<b>Implicit Eligibility Rules</b>	
Rule Field	Field whose value you want to base the rule on.
Operator	A comparison operator. The list of available operators changes depending on what you select from the <i>Rule Field</i> drop-down list.
Value	Value against which the rule field is compared.
Rule Type	<p>One of the following:</p> <ul style="list-style-type: none"> <li>• “ENABLER”—Student must satisfy this condition to take the test.</li> <li>• “DISABLER”—student must not satisfy this condition to take the test.</li> </ul> <p>For more information about rule types and how they impact eligibility, see the section <a href="#">Understanding test eligibility rules</a></p>

## Understanding test eligibility rules.

### Explicit eligibility rules.

If you specify “Explicit” as the eligibility type for an assessment, you must provide an explicit list of students that can take the test. This option is useful if there is a great deal of fragmentation regarding test eligibility. For example, when administering End of Course assessments, the system cannot automatically determine which students are registered for a particular course.

You specify explicit eligibility rules by uploading a list of students and their associated eligibilities. For detailed information, see the section [Managing Student Eligibility](#).

### Implicit eligibility rules.

If you specify “Implicit” as an eligibility type for an assessment, you must provide a set of eligibility criteria in the *Implicit Eligibility Rules* section (see [Figure 7](#)). The students in ART who meet all of the implicit criteria for an assessment will automatically be registered for that assessment.

There are two types of implicit eligibility rules:

- Enabler—A student must *satisfy* all enabler eligibility criteria to take the test.
- Disabler—A student must *fail* all disabler eligibility criteria to take the test.

Referring to the example in [Figure 7](#), there are two enabler rules: “Language Code = English” and “Grade Level When Tested = 4.” This means that all students who primarily communicate in English and who are in fourth grade at the time of the assessment are eligible to take the test.

## Understanding test windows, delay, and opportunities.

There are three interrelated factors that determine if a student is eligible for a test:

- Test Window—The start and end date when a test is available in TDS. An assessment can have one or more test windows.
- Opportunities—The number of times a student can take a test within a window, and the number of times a student can take the test over all the test windows.
- Delay—The number of calendar days that must pass between student test opportunities.

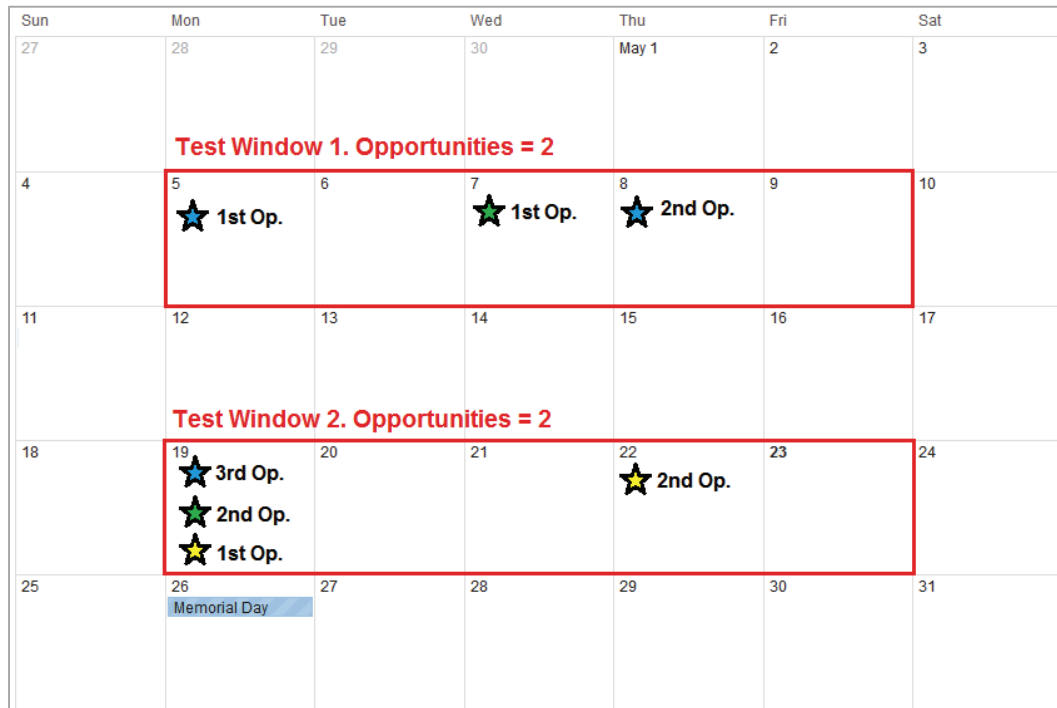
In [Figure 8](#), an example assessment has two test windows: one from May 5 to May 9 and one from May 19 to May 23. Students have two opportunities to take the test in each window. The total number of opportunities over all windows is three. The delay period for the assessment is three days.

- The first student, indicated by a blue star (★), takes the test for the first time on May 5. To take the second opportunity, the student waits three days until May 8. To take the test a third time, the student must wait until May 19. After that, the student cannot take the test again; even though there is another test opportunity available in Test Window 2, the student already exhausted all three global opportunities.
- The second student, indicated by a green star (★), takes the test for the first time on May 7. To take the second opportunity, the student must wait three days until May 10, but the next test window starts on May 19, so the student waits until then for the second opportunity.



- The third student, indicated by a yellow star (★), takes the test for the first time on May 19, then waits three days, until May 22, to take the test again. After that, the student cannot re-take the test, because the delay of three days is outside Test Window 2, which is the final window.

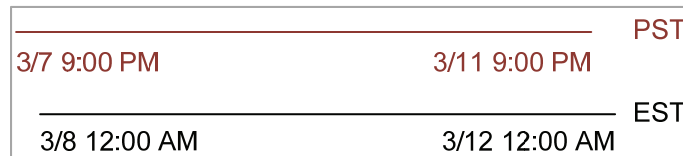
Figure 8. Effect of Test Windows, Delay, and Opportunities



## Understanding test windows and time zones.

Time zones impact the availability of a particular test. ART has a global setting for the time zone at the consortium level. All dates for test windows are at midnight in that time zone. If a local institution delivers a test in a different time zone, the students must start and end the test accordingly. For example, the consortium's time zone is EST, and a member institution's time zone is PST. If a test window is from March 8 through March 12, students in the EST time zone can take the test from March 8, 12:00 AM through March 12, 12:00 AM; students in the PST time zone can start taking the test earlier, from March 7, 9:00 PM, and must end the test earlier, by March 11, 9:00 PM. See [Figure 9](#).

Figure 9. Effect of Time Zones on Test Windows



## Modifying assessments

This section describes how to modify existing assessments. The overall process for modifying assessments consists of two main steps:

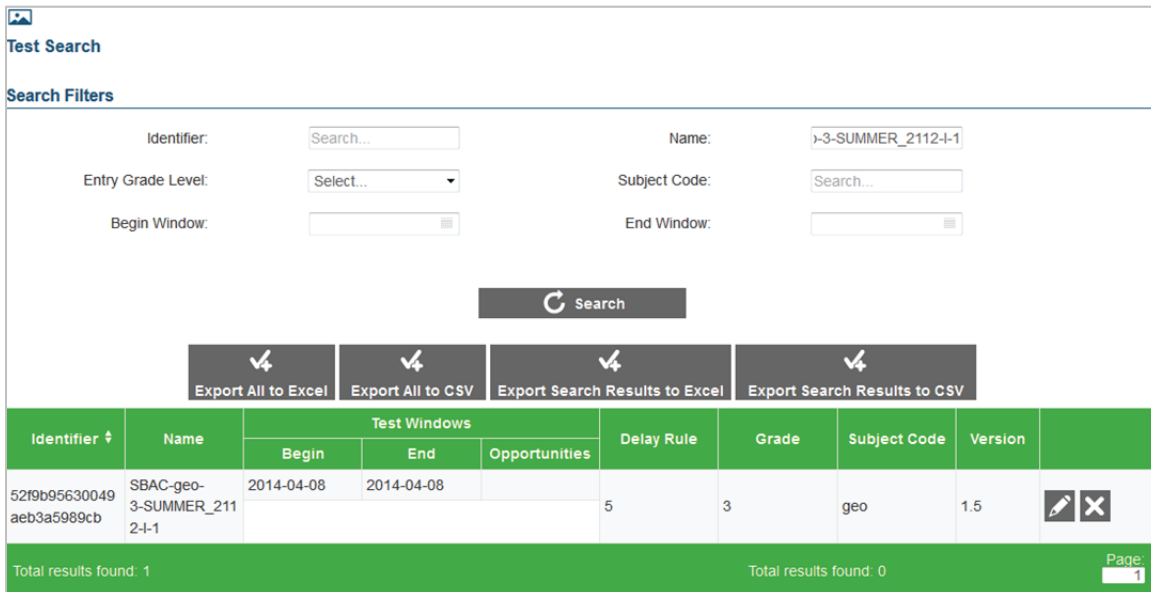
1. Search for and select the assessment.
2. Adjust the assessment's attributes.

The following subsections describe how to perform each of these steps.

*Note: The actions described in this section are only available to Test Registration Administrators.*

## Searching for assessments.

Figure 10. Test Search Screen with Search Results Table



**Test Search**

**Search Filters**

Identifier:  Name:

Entry Grade Level:  Subject Code:

Begin Window:  End Window:

Identifier	Name	Test Windows			Delay Rule	Grade	Subject Code	Version	
		Begin	End	Opportunities					
52f9b95630049aeb3a5989cb	SBAC-geo-3-SUMMER_2112-I-1	2014-04-08	2014-04-08		5	3	geo	1.5	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Total results found: 1 Total results found: 0 Page: 1

*To search for an assessment:*

1. On the ART home screen, click [Add/Modify Test Information]. The **Test Search** screen appears.
2. In the filters provided at the top of the screen, enter the necessary search parameters and click [Search]. The assessments that meet the selected search parameters appear in the table on this screen. A search can be filtered by the assessment's Identifier, Name, Entry Grade Level, Subject Code, Begin Window, or End Window.

## Understanding the search results table on the Test Search screen.

[Table 6](#) describes the columns in the Test Search table. Each row in the table also contains two icons:



- —Accesses the **Edit Test Information** screen, where you modify the assessment attributes.
- —Deletes the assessment and all registrations associated with that assessment.


Table 6. Fields in the Test Search results table

Column	Description
Identifier	Unique identifier for the assessment.
Name	Descriptive name for the assessment.
Test Windows	One row for each window during which students can take the test. Begin—Date when the test window starts. End—Date when the test window ends. Opportunities—Number of times student can take this test during the test window.
Delay Rule	Number of calendar days between test opportunities. For additional information about this field, see the section <a href="#">Understanding test windows</a> .
Grade	Grade levels to which the selected test applies.
Subject Code	Subject code corresponding to the selected test.
Version	Version of the selected test.

## Modifying an assessment.

Use the following procedure to modify an assessment.

*To modify an assessment:*

1. On the **Test Search** screen (see [Figure 10](#)), click [  ]. The **Edit Test Information** screen appears. This screen is a populated version of the screen used to set attributes for a new assessment (see [Figure 7](#)).
2. Using [Table 5](#) as a reference, modify the assessment's attributes.
3. Click [Save].

## Exporting assessments

You can export assessment search results as a CSV file, which can be opened using Excel or a spreadsheet application. You can also export results as an.xls file, which must be opened with Excel.

You can choose to export all available assessments or only those assessments that display in the search results.

*Note: The actions described in this section are available to Test Registration Administrators.*

### Export all assessments.

You can export a data file that contains all assessments available to you in ART.

*To export all assessments:*

1. On the **Test Search** screen (see [Figure 10](#)), click [Export All to Excel] or [Export All to CSV]. A file dialog box appears.
2. Save the file to the desired location on your computer, and open the file using Microsoft Excel or a compatible program (for .csv files).

### Export selected assessments.

You can export a data file that contains only the filtered assessments from the search results table on the **Test Search** screen.

*To export selected assessments:*

1. On the **Test Search** screen (see [Figure 10](#)), click [Export Search Results to Excel] or [Export Search Results to CSV]. A file dialog box appears.
2. Save the file to the desired location on your computer, and open the file using Microsoft Excel or a compatible program (for .csv files).

## Delete Assessments

You can delete assessments from the table on the **Test Search** screen.

*Note: The actions described in this section are available only to Test Registration Administrators.*



**WARNING: DELETING ASSESSMENTS** When you delete an assessment, ART deletes all associated test windows, delay rules, and student registrations.

*To delete an assessment:*

1. In the right-hand column of the **Test Search** screen (see [Figure 10](#)), click [X].
2. In the confirmation dialog box, click [OK]. ART deletes the assessment.

## REGISTRATION TASKS

After adding and configuring assessments, you can begin the test registration process. This process assigns assessments to students. The overall process consists of the following main steps:

1. Build a hierarchy of entity records from the state level to the institution level. You can upload entity and personnel records in groups, or create each record individually with the ART user interface.
2. Assign students to the institutions. You can upload multiple student records simultaneously or create each record individually with the ART user interface.
3. Assign assessments:
  - a. If assessments with implicit eligibility exist in ART, then all students who meet the implicit eligibility criteria are eligible for the assessment.
  - b. If you need to assign students to an assessment with explicit eligibility, then you must upload a file of students who are eligible for the assessment.

The following sections describe the registration tasks in detail.

### Creating and Modifying Records in ART

You can create or modify records using the following methods:

- **File Uploads:** This feature allows you to upload many records using predefined templates, which can be constructed in Excel. Depending on your user role, you can upload state, group of states, district, group of districts, institution, group of institutions, personnel, student, student group, student accommodation, and student eligibility records. In most cases, you can use file uploads to modify or delete existing records.
- **Create/Modify Records:** This feature allows you to create individual records using the forms provided on the ART user interface. Depending on your user role, you can create state, group of states, district, group of districts, institution, group of institutions, personnel, student, student group, and student accommodation records. You can also use the **Create/Modify** features to modify or delete existing records in ART.

### File Uploads.

The process for uploading files to ART consists of three main steps:

1. Download the appropriate file template for the record type.
2. Fill out the template by entering the information for each record in a new row.
3. Save and upload the file to ART.

## Download File Templates

The best way to create upload files for the various types of records is to use one of the available file templates. These templates organize records into tables, and you enter data into the tables—one row for each entity. Using the template reduces the risk of errors, and helps to ensure that your file upload is successful.

Templates are available in CSV, XLSX, TAB, and XLS formats.

To download file templates:

1. On the home screen, click **[Download File Templates]**.
2. Mark the checkboxes corresponding to the templates you want to download. For example, if you want to download templates for states and districts, mark the *State* and *District* checkboxes.
3. Mark the checkboxes corresponding to the format you want to download. For example, if you want to download templates in the CSV format, mark the CSV checkbox. The **[Download]** button appears.
4. Click **[Download]**. Your browser downloads the files. Depending on your browser's configuration, the files open in the appropriate application or are stored on your computer.

Figure 11. Download Templates screen

### Download Templates

Download file by selecting the file:

Entity Name
<input checked="" type="checkbox"/> District
<input type="checkbox"/> Group Of Districts
<input type="checkbox"/> School
<input type="checkbox"/> Group Of Schools
<input type="checkbox"/> Student
<input type="checkbox"/> StudentGroup
<input type="checkbox"/> Personnel
<input type="checkbox"/> Accommodations
<input type="checkbox"/> Eligibility

☒:CSV
 ☐:XLSX
 ☐:TAB
 ☐:XLS

☒ Download

## Creating an Upload File.

Each template consists of columns appropriate for the record type you selected. The top row in the template indicates the record type of the template, and the second row contains the data columns for which you enter the appropriate information. You enter the information for each record in the subsequent rows.

Figure 12. Sample Template for District Records

	A	B	C	D	E	F	G
1	DISTRICT	Record Type	Data Columns				
2	LocalEducationAgencyIdentifier	OrganizationName	NCESLEAID	ParentEntityType	ParentExternalId	StateAbbreviation	Delete
3							
4	Information for each record is entered in these rows						
5							



**CAUTION: Validation Errors.** Editing values in the top two rows of a template file results in validation errors when uploading the file. Do not edit values in the top two rows of a template file.

To create an upload file:

1. After downloading the appropriate template, open the file in Microsoft Excel or a compatible spreadsheet program.
2. Enter each record's information in a separate row and respective column. Be sure to adhere to the field requirements described in the appropriate table provided in the [Managing Records](#) section.

*Note: Upload templates are case-sensitive. Data must be entered as standard text. Any formatting, such as boldface, highlighting, or italics, will be lost during the upload.*

- To delete an existing record, enter "DELETE" in the Delete column for that record.
- To modify an existing record, enter the new information for that record. The old record will be replaced upon uploading the file. To modify the key value of a record (e.g., the email address of a personnel record), you must delete the original record and create a new one. The tables in the [Managing Records](#) section identify key columns with a plus (+).

*Note: Some record types cannot be deleted or modified via the file upload task. You must delete or modify those records from the **Create/Modify** screen for that record type.*

3. Save the upload file in one of the following file formats: CSV, XLS, XLSX, or TXT. After the file is saved, you can upload it to ART.

## Uploading Files.

The file upload process has four main steps: (1) Choose File, (2) Preview File, (3) Validate File, and (4) Confirmation. This process allows you to confirm that the correct file was uploaded and that it contains no errors. When uploading a file, you must use the correct upload screen for that record type.

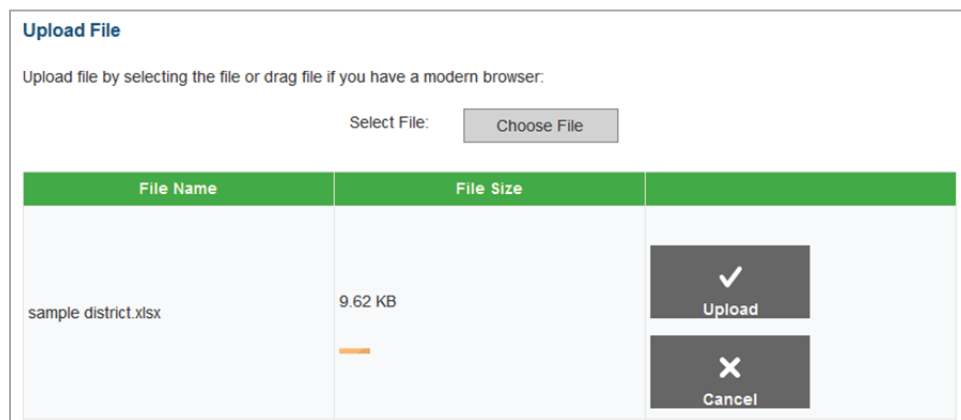
[Table 7](#) describes the available screens and the file types that they upload.

Table 7. File Upload Screens

Screen	Description
<b>Upload Institutions, Personnel and Students</b>	Use this screen to upload state, group of states, district, group of districts, institution, group of institutions, personnel, student, and student accommodation files.
<b>Upload Student Eligibility</b>	Use this screen to upload student eligibility files for assessments with explicit eligibility.
<b>Upload Student Group</b>	Use this screen to upload student group files.

## Step 1: Upload File

Figure 13. Upload File, Step 1: Choose the File



**Upload File**

Upload file by selecting the file or drag file if you have a modern browser:

Select File:

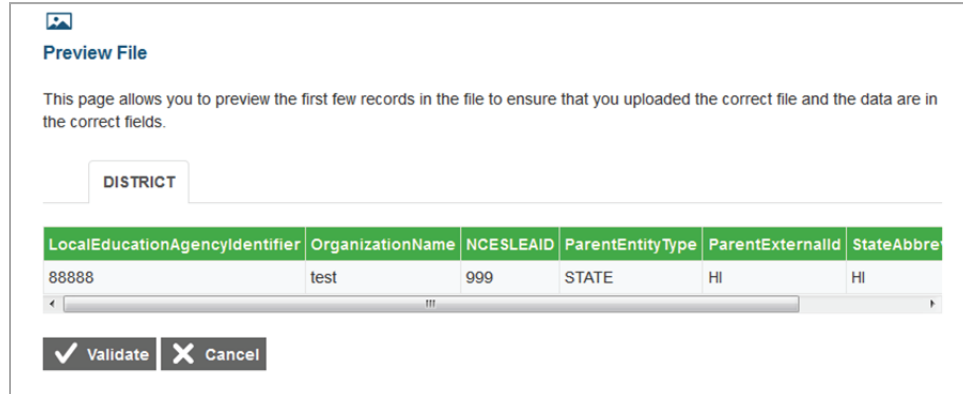
File Name	File Size	
sample district.xlsx	9.62 KB	<input type="button" value="✓ Upload"/> <input type="button" value="✗ Cancel"/>

1. On the home screen, navigate to the appropriate file upload screen for the record type.
2. Click **[Choose File]** and select the saved file on your computer. The file name and file size appears in the table on the screen. *Note: If you are using a modern browser, you may also click and drag the file directly into the table provided on the upload screen.*
3. Verify that the name of the file is correct, and then click **[Upload]**.



## Step 2: Preview File

Figure 14. Upload File, Step 2: Preview Records



**Preview File**

This page allows you to preview the first few records in the file to ensure that you uploaded the correct file and the data are in the correct fields.

**DISTRICT**

LocalEducationAgencyIdentifier	OrganizationName	NCESLEAID	ParentEntityType	ParentExternalId	StateAbbreviation
88888	test	999	STATE	HI	HI

✓ Validate ✕ Cancel

1. To ensure that you uploaded the correct file, you can preview the file you selected in the table on this screen. *Note: Only the first few records in the file are visible on this preview screen.*
2. To begin the file validation process, click [Validate].



**Caution:** If your file is large, uploading it may take a long time. DO NOT cancel the upload and try again, because ART may have already begun processing some of the records. If your file is too large to upload while you are online, you will be asked to provide an email address. When the file is processed, you will receive an email.

## Step 3: Validate File

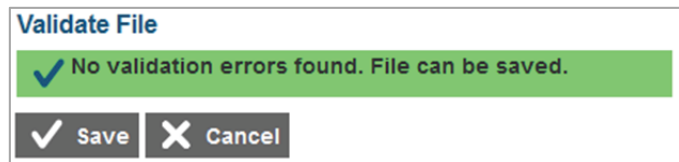
If the file passes validation, a message appears, indicating that no validation errors were found (see [Figure 15](#)). You can click **[Save]** to proceed to the final step.

If the file contains records with errors, an error message appears (see [Figure 16](#)). Depending on the severity of the error, either the entire file will fail or just the records with errors will fail.

Files with data that are not in the correct format as shown in the template will generate error messages by row, identifying the errors in the file.

The “Understanding Error Types” section in the column to the right provides a brief explanation of the three possible error types: fatal errors, record errors, and record warnings.

Figure 15. Step 3: Successful Validation



### Understanding Error Types




-  **If the entire file fails**, note the errors and the corresponding record numbers. Click **[Cancel]**, update your file, and then restart the upload process from Step 1: Choose File.
-  **If the file contains record errors**, these records *will not be committed* to ART. The records that passed validation can be committed. You may elect to fix the errors in your file and re-upload it, or to add these records individually on the appropriate **Create/Modify [Record]** screen.
-  **If the file contains record warnings**, these records will be saved to ART. However, you are strongly encouraged to review the associated records. You may edit these records using the appropriate **Create/Modify [Record]** screen.


Figure 16. Failed Validation

Error(s) of this type will cause the entire file upload to fail. Click Cancel, update your file and restart the upload process.

File can be saved but records with this type of error will not be included. You may elect to fix the errors and re upload the file or add these records later using the administration option to manage this type of file records.

These are warnings. File can be saved. However, you are strongly encouraged to review the associated records. You may edit these records using the administration option to manage this type of file records.

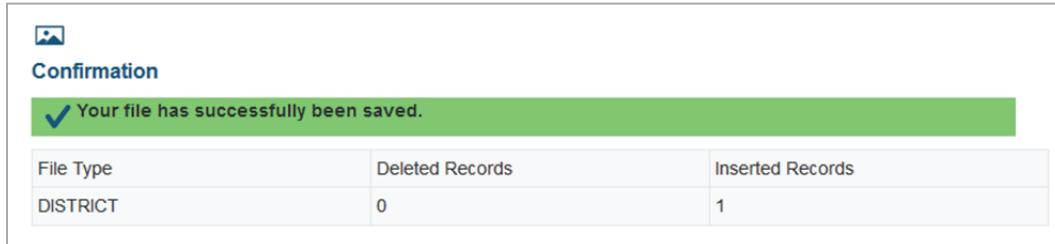
DISTRICT

	Record Number	Field Name	Field Value	Validation Message
	3	NCESLEAID	999	NCESLEAID already exists in DB and cannot be added

## Step 4: Confirmation

After you click [Save], the accepted records will be uploaded to ART. A table appears, confirming the type of records uploaded, the number of records deleted, and the number of records inserted.

Figure 17. Upload File, Step 4: Confirmation



**Confirmation**

✓ Your file has successfully been saved.

File Type	Deleted Records	Inserted Records
DISTRICT	0	1

## Creating/Modifying Individual Records.

The **Create/Modify** screens in ART allow you to add, modify, and delete individual records. You can also use these screens to search for and export records. When working with a record, you must use the appropriate screen for that record type. [Table 8](#) describes the available screens and the record types that they process.

Table 8. Record Management Screens

Screen	Description
<b>Create/Modify Institutions</b>	Use this screen to manage state, group of states, district, group of districts, institution, and group of institutions records. <i>Note: When managing entity records, you must select the appropriate entity type from the links provided at the top of the screen.</i>
<b>Create/Modify Students</b>	Use this screen to manage student records, including student accommodation and test eligibility information
<b>Create/Modify Personnel</b>	Use this screen to manage personnel records.
<b>Create/Modify Student Group</b>	Use this screen to manage student group records.

Figure 18. Sample Create/Modify [Record Type] Screen

Local Education Agency Id 
Organization Name:

State Abbreviation:

Local Education Agency Identifier	Organization Name	NCESLEAID	Parent Entity Type	Parent Entity Name	State Abbreviation	
1	t1	35	State		AK	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
1	t2	312	State		AK	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
11	test	4234	Group Of Districts		AZ	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
1616	1616	1616111			va	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2020	2020	202020	Group Of State		AK	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Total results found: 1570
Page:

The following items are available on every **Create/Modify** screen:

- Filter fields and **[Search]** button used to search for records. Some **Create/Modify** screens also include a checkbox that filters the search results table to only display records with errors.
- **[New]** button used to create new records.
- Various **[Export]** buttons used to export data for all records or just records in the table.
- Search results table that displays existing records. By default, this table displays all existing records. The table includes action buttons used to edit or delete individual records.



The actual filter fields and table columns on the **Create/Modify** screens vary for each record type. For more information, see the [Managing Records](#) section.

To add a new record:

1. Click **[New]**. The **Add [Record Type] Information** screen appears. This screen displays fields for creating a new record.
2. Enter the record's information in the provided fields. Be sure to adhere to the field requirements described in the appropriate table provided in the [Managing Records](#) section.
3. Click **[Save]**.


To search for records:

1. On the **Create/Modify** screen, enter values in the filter fields and click **[Search]**. The table updates to display only the records that meet the entered criteria.


To export records:

- To export all the records as an XLS file, click **[Export All to Excel]**.
- To export all the records as a CSV file, click **[Export All to CSV]**.
- To export only the filtered records included in the table as an XLS file, perform a search and click **[Export Search Results to Excel]**.
- To export only the filtered records included in the table as a CSV file, perform a search and click **[Export Search Results to CSV]**.

To modify an existing record:

1. In the search results table, click [  ] for a record. The **Edit [Record Type] Information** screen appears. This screen is similar to the screen used for adding new records.
2. You can modify the record's information in the available fields. Be sure to adhere to the field requirements described in the appropriate table provided in the [Managing Records](#) section.
3. Click **[Save]**.

To delete a record:

1. In the search results table, click [  ] for a record. A warning message appears, asking you to verify the action.
2. In the warning dialog box, click **[OK]**. The record will be removed from ART. **Caution: This action cannot be undone.**



**Caution:** If you delete the record for a parent entity, then all the child entities that belong to that parent will also be removed from ART. For example, if you delete a district record from ART, then all the institutions that belong to that district will also be deleted.

## About Data Columns and Edit Fields.

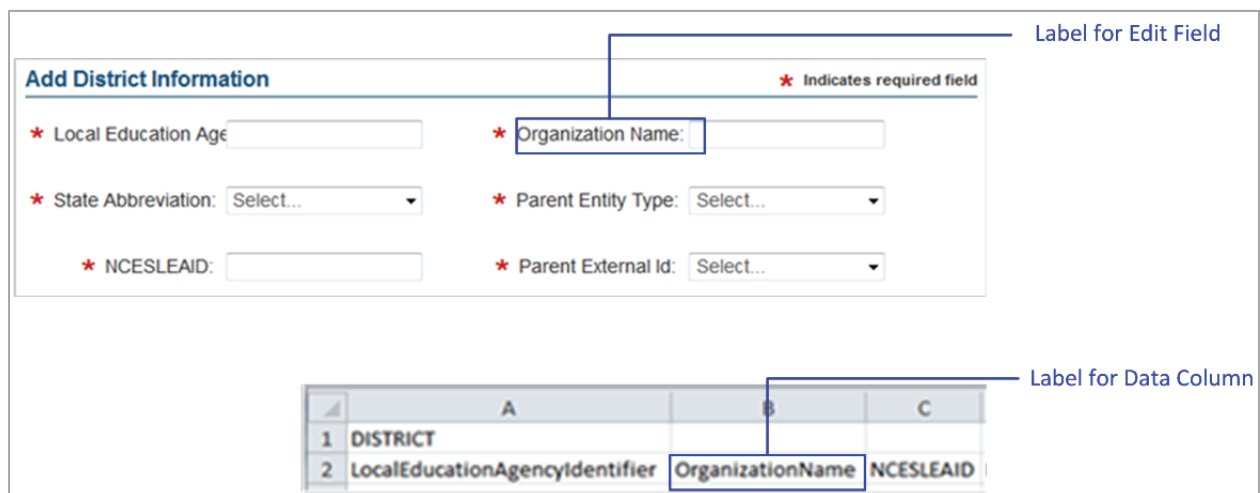
For a given record type, the fields displayed on the **Add [Record] Information** and **Edit [Record] Information** screens correspond with the data columns included in the template used to upload that same record type. Columns on the template are labeled with CamelCase, while fields on the **Add [Record Type] Information** and **Edit [Record] Information** screens are labeled with Title Case. Otherwise, these labels are identical.

For example, the **Add District Information** screen includes the *Organization Name* field. The corresponding column on the District template is “OrganizationName.” See [Figure 19](#).



The “Delete” column in upload templates does not have a corresponding field on the **Add [Record] Information** and **Edit [Record] Information** screens, because individual records are deleted directly from the search results table on their **Create/Modify** screen.

Figure 19. Comparison Between Labels for Edit Fields and Data Columns



**Add District Information** \* Indicates required field

\* Local Education Agency:  \* Organization Name:

\* State Abbreviation:  \* Parent Entity Type:

\* NCESLEAID:  \* Parent External Id:

	A	B	C
1	DISTRICT		
2	LocalEducationAgencyIdentifier	OrganizationName	NCESLEAID

## Managing Records

The following subsections provide instructions for creating or modifying the various record types, and also provide detailed information about creating, modifying, or deleting records through file uploads.

### Managing State Groups.

When building the hierarchy of entities in ART, you must start at the state or state group level. A state group consists of multiple states that are associated together and belong to the same client.

*Note: The actions described in this section are available to users with a client-level role.*



All entity group levels in the Smarter Balanced Consortium hierarchy are optional. You can configure and rename these entity group levels.

### Create or modify state groups.

Figure 20. Group of States Search Screen

Manage Entities

[State](#) | [GroupOfStates](#) | [District](#) | [GroupOfDistricts](#) | [Institution](#) | [GroupOfInstitutions](#)

GroupOfStates Search

Search Filters

Group Of States Identifier: 
Group Of States Name:

Search





New

Export All to Excel

Export All to CSV

Export Search Results to Excel


Export Search Results to CSV

Group Of States Identifier ↑	Group Of States Name	Parent Entity Type	Parent Entity Name	
123	Sample State Group	Client	Demo Client	 
AAAA	AAA	Client	Test Client	 


To create a state group:

1. On the ART home screen, click [Create/Modify Institutions].
2. On the **Manage Entities** screen, click the [Group of States] link.
3. On the **Group of States Search** screen, click [New].
4. On the **Add Group of States Information** screen, enter the information for the state group in the provided fields. For an explanation of these fields, see [Table 9](#).
5. Click [Save].

To modify a state group:

1. On the **Group of States Search** screen, search for a state group record.
2. In the search results table, click [  ] for a state group record.
3. On the **Edit Group of States Information** screen, modify the information for the state group in the provided fields as required. For an explanation of these fields, see [Table 9](#).
4. Click [Save].

To delete a state group:

1. On the **Group of States Search** screen, search for a state group record.
  2. In the search results table, click [  ] for a state group record.
  3. In the warning box that pops up, click [OK].
- Caution:** If you delete a state group, all the child entities within that group will also be deleted.

## Upload state groups.

You can add, modify, or delete state groups by uploading a file to ART.

To upload a state group file:

1. Download the Group of States template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 9](#) as a reference, enter a row of information for each state group you want to add, modify, or delete.
  - a. To update an existing state group record, enter the new information for the record in its own row. The previous record will be replaced upon uploading the file.
  - b. To delete an existing state group record, enter "DELETE" in the Delete column.
3. On the ART home screen, click [Upload Institutions, Personnel and Students].
4. Upload the state group file, following the instructions provided in the [Uploading Files](#) section.

[Table 9](#) describes the columns in the state-group file, and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add Group of States Information** screen. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 9. Upload State-Group File Requirements

Column	Description
GroupOfStatesIdentifier**	Unique identifier for a state group. <b>Up to 20 characters.</b>



Column	Description
GroupOfStatesName*	Descriptive name of state group. <b>Up to 50 characters.</b>
ParentEntityType*	State group's parent in the Consortium's hierarchy. Must be the following: <ul style="list-style-type: none"> <li>• <b>CLIENT</b>—Indicates the state group is a direct member of the consortium.</li> </ul> For a description of the Consortium's hierarchy in ART, see the section <a href="#">Understanding the Smarter Balanced Hierarchy</a> .
ParentExternalId*	Parent entity's identifier. <b>Up to 20 characters of an existing client's ID.</b>
Delete+	Flag for deleting the state group. <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the state group associated with the GroupOfStatesIdentifier.</li> <li>• <b>&lt;blank&gt;</b>—Add the new state group or modify the existing one.</li> </ul>

## Managing States.

After adding state groups, you can create states that belong to that group. You can also create states that belong to a client.

*Note: The actions described in this section are available to users with a client-level role.*

## Create or modify states.

Figure 21. State Search Screen

**State** | **GroupOfStates** | **District** | **GroupOfDistricts** | **Institution** | **GroupOfInstitutions**

**State Search**  
**Search Filters**


State Abbreviation: 
State Name:

State Abbreviation	State Name	Parent Entity Type	Parent Entity Name	
AK	Alaska	GroupOfStates	Sample State Group	<input type="button" value="Edit"/> <input type="button" value="Delete"/>


*To create a state:*

1. On the ART home screen, click [**Create/Modify Institutions**].
2. On the **Manage Entities** screen, click the [**State**] link.
3. On the **State Search** screen, click [**New**].
4. On the **Add State Information** screen, enter the information for the state in the provided fields. For an explanation of these fields, see [Table 10](#).
5. Click [**Save**].

*To modify a state:*

1. On the **State Search** screen, search for a state record.
2. In the search results table, click [  ] for a state record.
3. On the **Edit State Information** screen, modify the information for the state in the provided fields as required. For an explanation of these fields, see [Table 10](#).
4. Click [**Save**].

*To delete a state:*

1. On the **State Search** screen, search for a state record.
  2. In the search results table, click [  ] for a state record.
  3. In the warning box that pops up, click [**OK**].
- Caution:** If you delete a state, all of the child entities within that state will also be deleted.

## **Upload states.**

You can add, modify, or delete states by uploading a file to ART.

*To upload a state file:*

1. Download the State template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 10](#) as a reference, enter a row of information for each state you want to add, modify, or delete.
  - a. To modify an existing state record, enter the information for the new record in its own row. The old record will be replaced upon uploading the file.
  - b. To delete an existing state record, enter “DELETE” in the Delete column.
3. On the ART home screen, click [**Upload Institutions, Personnel and Students**].
4. Upload the state file, following the instructions provided in the [Uploading Files](#) section.

Table 10 describes the columns in the state file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add State Information** screen. Columns marked with an asterisk (\*) are required for add/modify actions; columns marked with a plus (+) are required for delete actions.

Table 10. Upload State File Requirements

Column	Description
StateAbbreviation*+	State's abbreviation. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
StateName*	Full state name. <b>Up to 50 characters.</b>
ParentEntityType*	State's parent in the Consortium's hierarchy. One of the following: <ul style="list-style-type: none"> <li>• <b>CLIENT</b>—Indicates the state is a direct member of the consortium.</li> <li>• <b>GROUPOFSTATES</b>—Indicates the state is a member of a group of states.</li> </ul> For a description of the Consortium's hierarchy in ART, see the section <a href="#">Understanding the Smarter Balanced Hierarchy</a> .
ParentExternalId*	Parent entity's identifier. <b>Up to 20 characters of an existing client's or state group's ID.</b>
Delete+	Flag for deleting the state. <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the state associated with StateAbbreviation.</li> <li>• <b>&lt;blank&gt;</b>—Add the new state record or modify the existing one.</li> </ul>

## Managing District Groups.

After adding state records, you can create district group records. District groups contain districts that are associated together and belong to the same state, state group, or client.

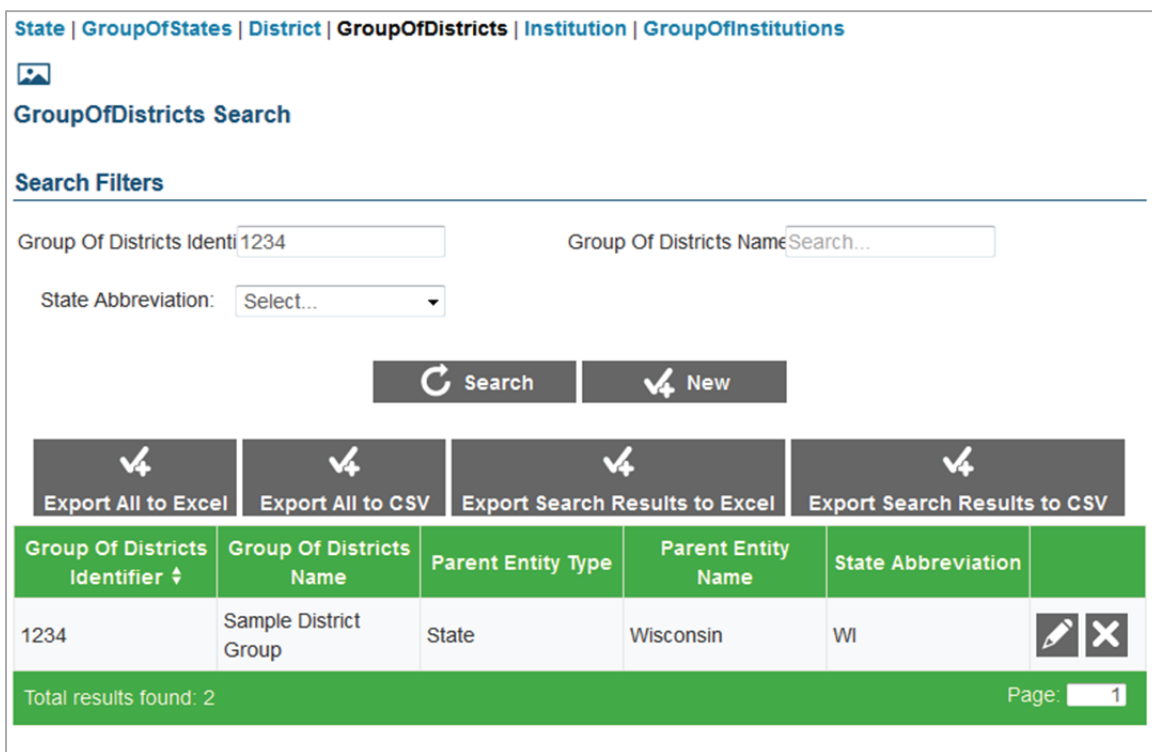
*Note: The actions described in this section are available to users with a state- or client-level role.*




All entity group levels in the hierarchy are optional. You can configure and rename these entity group levels.

## Create or modify district groups.

Figure 22. Group of Districts Search Screen





State | GroupOfStates | District | GroupOfDistricts | Institution | GroupOfInstitutions





 GroupOfDistricts Search



**Search Filters**

Group Of Districts Identifier: 1234      Group Of Districts Name: Search...

State Abbreviation: Select...

 Search       New

 Export All to Excel       Export All to CSV       Export Search Results to Excel       Export Search Results to CSV


Group Of Districts Identifier	Group Of Districts Name	Parent Entity Type	Parent Entity Name	State Abbreviation	
1234	Sample District Group	State	Wisconsin	WI	 

Total results found: 2      Page: 1


To create a district group:

1. On the ART home screen, click [Create/Modify Institutions].
2. On the **Manage Entities** screen, click the [Group Of Districts] link.
3. On the **Group of Districts Search** screen, click [New].
4. On the **Add Group of Districts Information** screen, enter the information for the district group in the provided fields. For an explanation of these fields, see [Table 11](#).
5. Click [Save].

To modify a district group:

1. On the **Group of Districts Search** screen, search for a district group record.
2. In the search results table, click [  ] for a district group record.
3. On the **Edit Group of Districts Information** screen, modify the information for the district group in the provided fields. For an explanation of these fields, see [Table 11](#).
4. Click [Save].

To delete a district group:

1. On the **Group of Districts Search** screen, search for a district group record.
  2. On the search results table, click [  ] for a district group record.
  3. In the warning box that pops up, click [OK].
- Caution: If you delete a district group, all of the child entities within that group will also be deleted.**

## Upload district groups.

You can add, modify, or delete district groups by uploading a file to ART.

To upload a district-group file:

1. Download the GroupOfDistricts template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 11](#) as a reference, enter a row of information for each district group you want to add, modify, or delete.
  - a. To modify an existing district group record, enter the new information for the record in its own row. The old record will be replaced upon uploading the file.
  - b. To delete an existing district group record, enter "DELETE" in the Delete column.
3. On the ART home screen, click [Upload Institutions, Personnel and Students].
4. Upload the district group file, following the instructions provided in the [Uploading Files](#) section.

[Table 11](#) describes the columns in the district-group file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add Group of Districts Information** screen. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 11. Upload District-Group File Requirements

Column	Description
GroupOfDistrictsIdentifier**	Unique identifier for group of districts. <b>Up to 20 characters.</b>

# Administration and Registration Tools User Guide

Column	Description
GroupOfDistrictsName*	Descriptive name for group of districts. <b>Up to 100 characters.</b>
ParentEntityType*	District group's parent in the Consortium's hierarchy. One of the following: <ul style="list-style-type: none"> <li>• <b>CLIENT</b>—Indicates the district group is a direct member of the consortium.</li> <li>• <b>GROUPOFSTATES</b>—Indicates the district group is a member of a group of states.</li> <li>• <b>STATE</b>—Indicates the district group is a member of a state.</li> </ul> For a description of the Consortium's hierarchy in ART, see the section <a href="#">Understanding the Smarter Balanced Hierarchy</a> .
ParentExternalId*	Parent entity's identifier. <b>Up to 20 characters of an existing client's, state group's, or state's ID.</b>
StateAbbreviation**	State in which the district group is located. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
Delete+	Flag for deleting the district group. <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the district group associated with the combination of GroupOfDistrictsIdentifier and StateAbbreviation.</li> <li>• <b>&lt;blank&gt;</b>—Add the new district group or modify an existing one.</li> </ul>

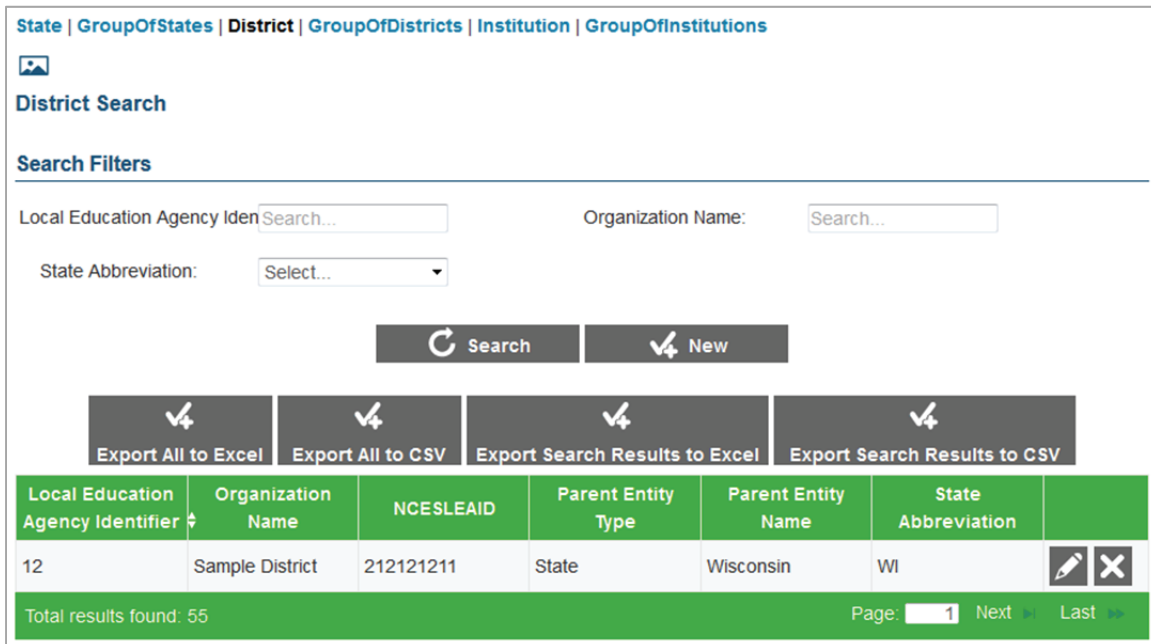
## Managing Districts.

After adding district group records, you can create district records. Districts can belong to a district group, state, state group, or client.

*Note: The actions described in this section are available to users with a state- or client-level role.*

### Create or modify a district.

Figure 23. District Search Screen



State | GroupOfStates | **District** | GroupOfDistricts | Institution | GroupOfInstitutions

**District Search**

**Search Filters**

Local Education Agency Identifier:  Organization Name:

State Abbreviation:


Local Education Agency Identifier	Organization Name	NCESLEAID	Parent Entity Type	Parent Entity Name	State Abbreviation
12	Sample District	212121211	State	Wisconsin	WI

Total results found: 55 Page: 1 Next Last


To create a district:

1. On the ART home screen, click [Create/Modify Institutions].
2. On the **Manage Entities** screen, click the [District] link.
3. On the **District Search** screen, click [New].
4. On the **Add District Information** screen, enter the information for the district in the provided fields. For an explanation of these fields, see [Table 12](#).
5. Click [Save].

*To modify a district:*

1. On the **District Search** screen, search for a district record.
2. In the search results table, click [  ] for a district record.
3. On the **Edit District Information** screen, modify the information for the district in the provided fields. For an explanation of these fields, see [Table 12](#).
4. Click **[Save]**.

*To delete a district:*

1. On the **District Search** screen, search for a district record.
  2. In the search results table, click [  ] for a district record.
  3. In the warning box that pops up, click **[OK]**.
- Caution: If you delete a district, all of the child entities within that district will also be deleted.**

## **Upload districts.**

You can add, modify, or delete districts by uploading a file to ART.

*To upload a district file:*

1. Download the District template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 12](#) as a reference, enter a row of information for each district you want to add, modify, or delete.
  - a. To modify an existing district record, enter the information for the new record in its own row. The old record will be replaced upon uploading the file.
  - b. To delete an existing district record, enter "DELETE" in the Delete column.
3. On the ART home screen, click **[Upload Institutions, Personnel and Students]**.
4. Upload the district file, following the instructions provided in the [Uploading Files](#) section.



[Table 12](#) describes the columns in the district file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add District Information** screen. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 12. Upload District File Requirements

Column	Description
LocalEducationAgencyIdentifier**	A unique number or alphanumeric code assigned to a local education agency by a school system, a state, or other agency or entity. <b>Up to 20 alphanumeric characters.</b>
OrganizationName*	District Name. <b>Up to 60 characters.</b>
NCESLEAID	Unique nationwide district identifier. <b>Up to 20 numbers.</b>
ParentEntityType*	District's parent in the Consortium's hierarchy. One of the following: <ul style="list-style-type: none"> <li>• <b>CLIENT</b>—Indicates the district is a direct member of the consortium.</li> <li>• <b>GROUPOFSTATES</b>—Indicates the district is a member of a group of states.</li> <li>• <b>STATE</b>—Indicates the district is a member of a state.</li> <li>• <b>GROUPOFDISTRICTS</b>—Indicates the district is a member of a group of districts.</li> </ul> For a description of the Consortium's hierarchy in ART, see the section <a href="#">Understanding the Smarter Balanced Hierarchy</a> .
ParentExternalId*	Parent entity's identifier. <b>Up to 20 characters of an existing client's, state group's, state's, or district group's ID.</b>
StateAbbreviation**	State in which the district is located. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
Delete+	Flag for deleting the district. <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the district associated with the combination of LocalEducationAgencyIdentifier and StateAbbreviation.</li> <li>• <b>&lt;blank&gt;</b>—Add the new district, or modify the existing district.</li> </ul>

## Managing Institution Groups.

After adding district records, you can create institution group records. Institution groups contain institutions that are associated together and belong to the same district, district group, state, state group, or client.

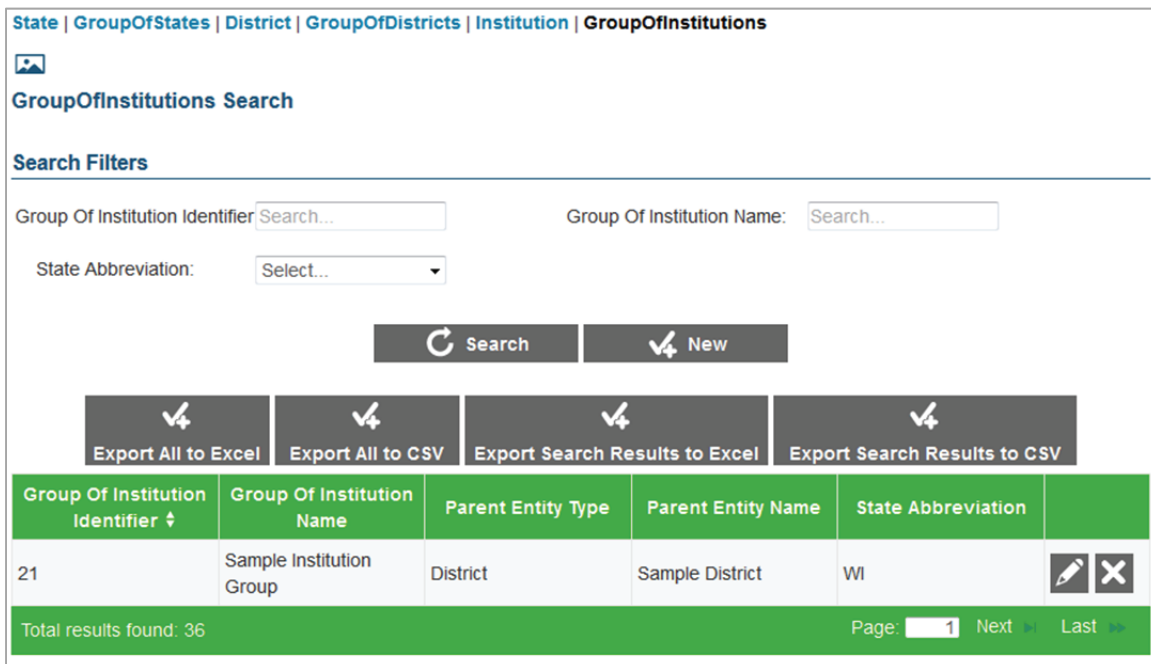
*Note: The actions described in this section are available to users with a district-, state-, or client-level user role.*



All entity group levels in the hierarchy are optional. You can configure and rename these entity group levels.

## Create or modify institution groups.

Figure 24. Institution Group Search Screen





State | GroupOfStates | District | GroupOfDistricts | Institution | GroupOfInstitutions

**GroupOfInstitutions Search**

**Search Filters**

Group Of Institution Identifier:  Group Of Institution Name:

State Abbreviation:


Group Of Institution Identifier	Group Of Institution Name	Parent Entity Type	Parent Entity Name	State Abbreviation	
21	Sample Institution Group	District	Sample District	WI	 

Total results found: 36 Page: 1 Next Last


To create an institution group:

1. On the ART home screen, click **[Create/Modify Institutions]**.
2. On the **Manage Entities** screen, click the **[Group Of Institutions]** link.
3. On the **Group of Institutions Search** screen, click **[New]**.
4. On the **Add Group of Institutions Information** screen, enter the information for the institution group in the provided fields. For an explanation of these fields, see [Table 13](#).
5. Click **[Save]**.

*To modify an institution group:*

1. On the **Group of Institutions Search** screen, search for an institution group record.
2. On the search results table, click [  ] for an institution group record.
3. On the **Edit Group of Institutions Information** screen, modify the information for the institution group in the provided fields. For an explanation of these fields, see [Table 13](#).
4. Click [Save].

*To delete an institution group:*

1. Perform a search for a particular institution group record on the **Group of Institutions Search** screen.
2. On the search results table, click [  ] for an institution group record.
3. In the warning box that pops up, click [OK].

**Caution:** If you delete an institution group, all the child entities within that group will also be deleted.

### **Upload institution groups.**

You can add, modify, or delete institution groups by uploading a file to ART.

*To upload an institution group file:*

1. Download the GroupOfInstitutions template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 13](#) as a reference, enter a row of information for each institution group you want to add, modify, or delete.
  - a. To modify an existing institution group record, enter the information for the new record in its own column. The old record will be replaced upon uploading the file.
  - b. To delete an existing institution group record, enter "DELETE" in the Delete column.
3. On the ART home screen, click [Upload Institutions, Personnel and Students].
4. Upload the institution group file, following the instructions provided in the [Uploading Files](#) section.

[Table 13](#) describes the columns in the institution group file and lists acceptable values in **bold type**. These columns also correspond with the fields on the *Add Group of Institutions Information*. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 13. Upload Institution Group File Requirements

Column	Description
GroupOfInstitutionsIdentifier**	Unique identifier for institution group. <b>Up to 20 alphanumeric characters.</b>
GroupOfInstitutionsName*	Institution group's name. <b>Up to 60 alphanumeric characters.</b>
ParentEntityType*	Institution group's parent in the Consortium's hierarchy. One of the following: <ul style="list-style-type: none"> <li>• <b>CLIENT</b>—Indicates the institution group is a direct member of the consortium.</li> <li>• <b>GROUPOFSTATES</b>—Indicates the institution group is a member of a group of states.</li> <li>• <b>STATE</b>—Indicates the institution group is a member of a state.</li> <li>• <b>GROUPOFDISTRICTS</b>—Indicates the institution group is a member of a group of districts.</li> <li>• <b>DISTRICT</b>—Indicates the institution group is a member of a district.</li> </ul> For a description of the Consortium's hierarchy in ART, see the section <a href="#">Understanding the Smarter Balanced Hierarchy</a> .
ParentExternalId*	Parent entity's identifier. <b>Up to 20 characters of an existing client's, state group's, state's, district group's, or district's ID.</b>
StateAbbreviation**	State in which the institution group is located. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
Delete+	Flag for deleting the institution group. <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the institution group associated with the combination of GroupOfInstitutionsIdentifier and StateAbbreviation.</li> <li>• <b>&lt;blank&gt;</b>—Add the new institution group or modify an existing institution group.</li> </ul>

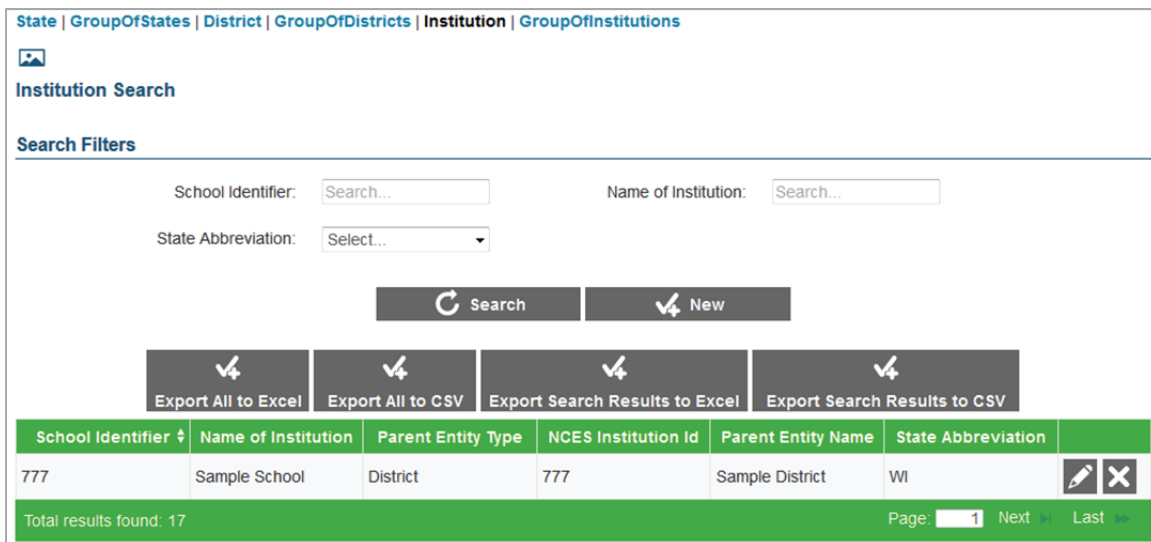
## Managing Institutions.

After adding institution group records, you can create institution records. Institutions can belong to an institution group, district, district group, state, state group, or client.

*Note: The actions described in this section are available to users with a district-, state-, or client-level role.*

### Create or modify an institution.


Figure 25. Institution Search Screen




To create an institution:

1. On the ART home screen, click **[Create/Modify Institutions]**.
2. On the **Manage Entities** screen, click the **[Institution]** link.
3. On the **Institution Search** screen, click **[New]**.
4. On the **Add Institution Information** screen, enter the information for the institution in the provided fields. For an explanation of these fields, see [Table 14](#).
5. Click **[Save]**.

To modify an institution:

1. On the **Institution Search** screen, search for an institution record.
2. In the search results table, click  for an institution record.
3. On the **Edit Institution Information** screen, modify the information for the institution in the provided fields. For an explanation of these fields, see [Table 14](#).
4. Click **[Save]**.

To delete an institution:

1. On the **Institution Search** screen, search for an institution record.
2. In the search results table, click [  ] for an institution record.
3. In the warning box that pops up, click [OK].

**Caution: If you delete an institution, all of the child entities within that institution will also be deleted.**

## Upload Institutions.

You can add, modify, or delete institutions by uploading a file to ART.

To upload an institution file:

1. Download the Institution template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 14](#) as a reference, enter a row of information for each institution you want to add, modify, or delete.
  - a. To modify an existing institution record, enter the information for the new record in its own row. The old record will be replaced upon uploading the file.
  - b. To delete an existing institution record, enter “DELETE” in the Delete column.
3. On the ART home screen, click [Upload Institutions, Personnel and Students].
4. Upload the institution file, following the instructions provided in the [Uploading Files](#) section.

[Table 14](#) describes the columns in the institution file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add Institution Information** screen. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 14. Upload Institution File Requirements

Column	Description
SchoolIdentifier**	Unique identifier for the institution. <b>Up to 20 alphanumeric characters.</b>
NameOfInstitution*	Institution name. <b>Up to 60 alphanumeric characters.</b>

# Administration and Registration Tools User Guide

Column	Description
ParentEntityType*	<p>Institution's parent in the Consortium's hierarchy. One of the following:</p> <ul style="list-style-type: none"> <li>• <b>CLIENT</b>—Indicates the institution is a direct member of the consortium.</li> <li>• <b>GROUPOFSTATES</b>—Indicates the institution is a member of a group of states.</li> <li>• <b>STATE</b>—Indicates the institution is a member of a state.</li> <li>• <b>GROUPOFDISTRICTS</b>—Indicates the institution is a member of a group of districts.</li> <li>• <b>DISTRICT</b>—Indicates the institution is a member of a district.</li> <li>• <b>GROUPOFINSTITUTIONS</b>—Indicates the institution is a member of a group of institutions.</li> </ul> <p>For a description of the Consortium's hierarchy in ART, see the section <a href="#">Understanding the Smarter Balanced Hierarchy</a>.</p>
NCESInstitutionId*	<p>Institution's unique nationwide identifier. You can look up an NCES identifier at <a href="http://nces.ed.gov/ccd/schoolsearch/">http://nces.ed.gov/ccd/schoolsearch/</a>.</p>
ParentExternalId*	<p>Parent entity's identifier.</p> <p><b>Up to 20 characters of an existing client's, state group's, state's, district group's, district's, or institution group's ID.</b></p>
StateAbbreviation**	<p>State in which the institution is located. Any standard two-letter state abbreviation is valid. In addition, the following are also valid:</p> <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
Delete+	<p>Flag for deleting the institution.</p> <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the institution associated with SchoolIdentifier.</li> <li>• <b>&lt;blank&gt;</b>—Add the new institution or modify an existing one.</li> </ul>

## Managing Personnel.

You can create personnel records that are within your entity and below your level of the hierarchy. You cannot create personnel records for a higher entity level or for an entity to which you do not belong. For example, if you belong to District A, you can only create personnel records in District A that are associated with the district level or below. Once personnel and students are both added to ART, students can be associated to personnel via student groups.

*Note: The actions described in this section are available to client-, state-, district-, and school-level users.*

### Create or modify a personnel record.

Figure 26. Personnel Search Screen

User Search

Search Filters


☐ Only show users with errors!


First Name:


Last Name:


Email Address:


State Abbreviation:


 Search



 New

 Export All to Excel


 Export All to CSV

 Export Search Results to Excel

 Export Search Results to CSV




First Name	Last Or Surname	Email Address	Telephone Number	Role Associations				
				Role	Associated Entity Name	Level	State Abbreviation	
John	Smith	sample@demo.edu	555-123-4567	Administrator	Test Client	CLIENT		 
				Test Author		STATE		

To create a personnel record:


- On the ART home screen, click **[Create/Modify Personnel]**.
- On the **Personnel Search** screen, click **[New]**.
- On the **Add Personnel Information** screen, enter the information for the personnel record in the provided fields. For an explanation of these fields, see [Table 15](#).
- To associate the personnel with a role, do the following:
  - Click  in the *Role Associations* section.
  - Select options from the drop-down menus provided in this section.
  - Repeat steps [a–b](#) to add additional roles as necessary.
- Optional:* To ensure the user's information is current across the Single Sign-On System, in the *Actions* section click **[Sync]**.
- Optional:* To reset the user's password, click **[Reset Password]**.
- Optional:* To prohibit the user from logging in, click **[Lock]** at the bottom of the screen.
- Click **[Save]**.



*To modify a personnel record:*

1. On the **Personnel Search** screen, search for a personnel record.
2. On the search results table, click [  ] for a personnel record.
3. On the **Edit Personnel Information** screen, modify the information for the user in the provided fields. For an explanation of these fields, see [Table 15](#).
4. To associate the personnel with a role, do the following:
5. Click [  ] in the *Role Associations* section.
  - a. Select options from the drop-down menus provided in this section.
  - b. To remove a role association, click [  ] next to that role.
6. *Optional:* To ensure the user's information is current across the Single Sign-On System, in the *Actions* section click [Sync].
7. *Optional:* To reset the user's password, click [Reset Password].
8. *Optional:* To prohibit the user from logging in, click [Lock] at the bottom of the screen.
  - a. To allow a locked user to log in, click [Unlock] at the bottom of the screen.
9. Click [Save].

*To delete a personnel record:*

1. On the **Personnel Search** screen, search for a personnel record.
2. On the search results table, click [  ] for the record you want to delete.
3. In the warning box that pops up, click [OK].

## Upload personnel.

You can add, modify, or delete personnel by uploading a file to ART. You can also add multiple user role and entity associations for a single personnel record.

To upload a personnel file:

1. Download the Personnel template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 15](#) as a reference, enter a row of information for each personnel record you want to add, modify, or delete.
  - a. To add multiple roles for a user, enter each role association in its own row of the template.
  - b. To delete an existing personnel record, enter “DELETE” in the Delete column. *Note: You must delete each role association record to remove the personnel record.*
  - c. If you want to replace a personnel record, you must delete the original record and then create a new one, otherwise the system may regard the new record as an additional role.
3. On the ART home screen, click **[Upload Institutions, Personnel and Students]**.
4. Upload the user file, following the instructions provided in the [Uploading Files](#) section.

[Table 15](#) describes the columns in the personnel file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add Personnel Information** screen. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 15. Upload Personnel File Requirements

Column	Description
FirstName*	User's first name. <b>Up to 35 characters.</b>
LastOrSurname*	User's last name. <b>Up to 35 characters.</b>
ElectronicMailAddress**	User's email address. <b>Up to 128 characters in standard email address format.</b>
TelephoneNumber	Telephone number including the area code, and optional extension. <b>Up to 24 characters in XXX-XXX-XXXX xNNNNNN or XXX-XXX-XXXX xNNNNNN format.</b>
Role*	Role assigned to the personnel. <b>Up to 30 characters.</b>
AssociatedEntityID*	Identifier of entity associated with the personnel. <b>Up to 20 characters.</b>

# Administration and Registration Tools User Guide

Column	Description
Level*	<p>Personnel-role combination's parent in the Consortium's hierarchy.</p> <ul style="list-style-type: none"> <li>• <b>CLIENT</b> – Indicates the user is a direct member of the consortium.</li> <li>• <b>GROUPOFSTATES</b> – Indicates user is a member of a group of states.</li> <li>• <b>STATE</b> – Indicates user is a member of a state.</li> <li>• <b>GROUPOFDISTRICTS</b> – Indicates user is a member of a group of districts.</li> <li>• <b>DISTRICT</b> – Indicates user is a member of a district.</li> <li>• <b>GROUPOFINSTITUTIONS</b> – Indicates user is a member of a group of institutions.</li> <li>• <b>INSTITUTION</b> – Indicates user is a member of a group of an institution.</li> </ul> <p>For a description of the Consortium's hierarchy in ART, see the section <a href="#">Understanding the Smarter Balanced Hierarchy</a>.</p>
StateAbbreviation*	<p>State with which the personnel is associated. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid:</p> <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
Delete*	<p>Flag for deleting the personnel-role combination.</p> <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the user-role combination associated with the ElectronicMailAddress.</li> <li>• <b>&lt;blank&gt;</b>—Add the new personnel record or modify an existing one.</li> </ul>

## Managing Students.

After adding institution records, you can add students to ART, along with their demographic information. Students can only belong to institution entities. Once students are added to ART, any student who meets the implicit eligibility criteria for an assessment that has also been added to ART will automatically be registered for that assessment.

*Note: The actions described in this section are available to users with a client-, state-, district-, or school-level role.*

### Create or modify a student.

Figure 27. Student Search Screen

Student Search

Search Filters

☐ Show students with accommodation subjects that Don't match assessments

State Abbreviation: Select...

District Identifier: Search...

School Identifier: Search...

Student Identifier:

Entry Grade Level: Select...

Search



New

Export All to Excel


Export All to CSV

Export Search Results to Excel




Export Search Results to CSV

Student Identifier	Organization Name	Name of Institution	State Abbreviation	Last Name	First Name	Middle Name	Sex	Birth Date	Entry Grade Level	
1234	Sample Org	Demo	AK	Smith	Jane	T	Female	1/1/2001	08	 


To create a student record:

1. On the ART home screen, click **[Create/Modify Students]**.
2. On the **Student Search** screen, click **[New]**.
3. On the **Add Student Information** screen, enter the information for the student, including demographic information, in the provided fields. For an explanation of these fields, see [Table 16](#).
4. To add an accommodation for the student, click [  ] in the *Accommodations* section, and enter the accommodation information in the provided fields. For more information about managing accommodations, see the [Managing Accommodations](#) section.
5. Click **[Save]**.

*To modify a student record:*

1. On the **Student Search** screen, search for a student record.
2. In the search results table, click [  ] for a student record.
3. On the **Edit Student Information** screen, modify the information for the student, including demographic information, in the provided fields. For an explanation of these fields, see [Table 16](#).
4. To add an accommodation for the student, click [  ] in the *Accommodations* section, and enter the accommodation information in the provided fields. For more information about managing accommodations, see the [Managing Accommodations](#) section.
5. To remove an accommodation, click [  ] next to that accommodation.
6. Click [**Save**].

*To delete a student:*

1. On the **Student Search** screen, search for a student record.
2. In the search results table, click [  ] for a student record.
3. In the warning box that pops up, click [**OK**].

## **Upload students.**

You can add, modify, or delete students by uploading a file to ART.

*To upload a student file:*

1. Download the Student template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 16](#) as a reference, enter a row of information for each student you want to add, modify, or delete.
  - a. To modify an existing student record, enter the information for the new record in its own row. The old record will be replaced upon uploading the file.
  - b. To delete an existing student record, enter “DELETE” in the Delete column.
3. On the ART home screen, click [**Upload Institutions, Personnel and Students**].
4. Upload the student file, following the instructions provided in the [Uploading Files](#) section.

Table 16 describes the columns in the student file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add Student Information** screen. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 16. Upload Student File Requirements

Column	Description
StateAbbreviation**	State in which the student attends school. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
ResponsibleDistrictIdentifier*	Identifier for the district related to the student. <b>Up to 30 alphanumeric characters of an existing district ID.</b>
ResponsibleSchoolIdentifier*	Identifier for the school related to the student. <b>Up to 30 alphanumeric characters of an existing school ID.</b>
LastOrSurname	Student's last name. <b>Up to 35 characters.</b>
FirstName	Student's first name. <b>Up to 35 characters.</b>
MiddleName	Student's middle name. <b>Up to 35 characters.</b>
Birthdate	Student's birth date. <b>YYYY-MM-DD format with leading zeros for month and day.</b>
StudentIdentifier**	State-assigned student identifier (SSID). <b>Up to 30 characters.</b>
ExternalSSID*	Alternative state-assigned student Identifier. If a state chooses not to share its students' SSIDs with consortium members, ART provides this number instead. <b>Up to 50 characters.</b>
ConfirmationCode*	Student's first name (if state policy allows) or another alphanumeric code assigned by the state. The student uses this code in conjunction with an SSID to log in to the test. The code helps authenticate the student at testing time and does not have to be unique. <b>Up to 35 characters.</b>

# Administration and Registration Tools User Guide

Column	Description
GradeLevelWhenAssessed*	<p>Student's enrolled grade.</p> <ul style="list-style-type: none"> <li>• IT – Infant/toddler</li> <li>• PR – Preschool</li> <li>• PK – Prekindergarten</li> <li>• TK – Transitional kindergarten</li> <li>• KG – Kindergarten</li> <li>• 01 – First grade</li> <li>• 02 – Second grade</li> <li>• 03 – Third grade</li> <li>• 04 – Fourth grade</li> <li>• 05 – Fifth grade</li> <li>• 06 – Sixth grade</li> <li>• 07 – Seventh grade</li> <li>• 08 – Eighth grade</li> <li>• 09 – Ninth grade</li> <li>• 10 – Tenth grade</li> <li>• 11 – Eleventh grade</li> <li>• 12 – Twelfth grade</li> <li>• 13 – Grade 13</li> <li>• PS – Postsecondary</li> <li>• UG – Ungraded</li> </ul>
Sex*	<p>Student's gender.</p> <ul style="list-style-type: none"> <li>• Male</li> <li>• Female</li> </ul>
HispanicOrLatinoEthnicity*	<p>Hispanic Ethnic Flag.</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
AmericanIndianOrAlaskaNative*	<p>American Indian/Alaskan Native Race Flag.</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
Asian*	<p>Asian Race Flag.</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
BlackOrAfricanAmerican*	<p>African American Race Flag.</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>

# Administration and Registration Tools User Guide

Column	Description
White*	White Race Flag. <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
NativeHawaiianOrOtherPacificIslander*	Native Hawaiian/Other Pacific Islander Race Flag. <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
DemographicRaceTwoOrMoreRaces*	A person having origins in any of more than one of the racial groups. <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
IDEAIndicator*	Student Enrolled in IEP. <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
LEPStatus*	Student identified as LEP. <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
Section504Status*	Student with 504 plan. <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> <li>• Unknown/Cannot Provide</li> </ul>
EconomicDisadvantageStatus*	An indication that the student met the state's criteria for classification as having an economic disadvantage. <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
LanguageCode	Three-character code for the specific language or dialect that a person uses to communicate. For a listing of acceptable values, see <a href="https://ceds.ed.gov/languageCodes.aspx">https://ceds.ed.gov/languageCodes.aspx</a> .
EnglishLanguageProficiencyLevel	An indication of the progress made by a student toward English proficiency. <b>Up to 20 characters.</b>



# Administration and Registration Tools User Guide

Column	Description
MigrantStatus	<p>Persons who are, or whose parents or spouses are, migratory agricultural workers, including migratory dairy workers or migratory fishers, and who, in the preceding 36 months, in order to obtain, or accompany such parents or spouses, in order to obtain, temporary or seasonal employment in agricultural or fishing work (A) have moved from one LEA to another; (B) in a state that comprises a single LEA, have moved from one administrative area to another within such LEA; or (C) reside in an LEA of more than 15,000 square miles, and migrate a distance of 20 miles or more to a temporary residence to engage in a fishing activity.</p> <ul style="list-style-type: none"> <li>• <b>Yes</b></li> <li>• <b>No</b></li> <li>• <b>&lt;blank&gt;</b></li> </ul>
FirstEntryDateIntoUSSchool	<p>The year, month, and day of a student's initial enrollment into a United States school.</p> <p><b>YYYY-MM-DD format with leading zeros for month and day.</b></p>
LimitedEnglishProficiencyEntryDate	<p>The year, month, and day a student classified as limited English proficient entered the LEP program.</p> <p><b>YYYY-MM-DD format with leading zeros for month and day.</b></p>
LEPExitDate	<p>The year, month, and day a student classified as limited English proficient exited the LEP program.</p> <p><b>YYYY-MM-DD format with leading zeros for month and day.</b></p>
TitleIIILanguageInstructionProgramType	<p>Title III Language Instruction Program Type.</p> <ul style="list-style-type: none"> <li>• <b>DualLanguage</b> – Dual language</li> <li>• <b>TwoWayImmersion</b> – Two-way immersion</li> <li>• <b>TransitionalBilingual</b> – Transitional bilingual</li> <li>• <b>DevelopmentalBilingual</b> – Developmental bilingual</li> <li>• <b>HeritageLanguage</b> – Heritage language</li> <li>• <b>ShelteredEnglishInstruction</b> – Sheltered English instruction</li> <li>• <b>StructuredEnglishImmersion</b> – Structured English immersion</li> <li>• <b>SDAIE</b> – Specially designed academic instruction delivered in English (SDAIE)</li> <li>• <b>ContentBasedESL</b> – Content-based ESL</li> <li>• <b>PullOutESL</b> – Pull-out ESL</li> <li>• <b>Other</b> – Other</li> </ul>

# Administration and Registration Tools User Guide

Column	Description
PrimaryDisabilityType	<p>The major or overriding disability condition that best describes a student's impairment.</p> <ul style="list-style-type: none"> <li>• <b>AUT</b> – Autism</li> <li>• <b>DB</b> – Deaf-blindness</li> <li>• <b>DD</b> – Developmental delay</li> <li>• <b>EMN</b> – Emotional disturbance</li> <li>• <b>HI</b> – Hearing impairment</li> <li>• <b>ID</b> – Intellectual disability</li> <li>• <b>MD</b> – Multiple disabilities</li> <li>• <b>OI</b> – Orthopedic impairment</li> <li>• <b>OHI</b> – Other health impairment</li> <li>• <b>SLD</b> – Specific learning disability</li> <li>• <b>SLI</b> – Speech or language impairment</li> <li>• <b>TBI</b> – Traumatic brain injury</li> <li>• <b>VI</b> – Visual impairment</li> </ul>
Delete <sup>+</sup>	<p>Flag for deleting the record.</p> <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the student associated with the combination of StateAbbreviation and StudentIdentifier.</li> <li>• <b>&lt;blank&gt;</b>—Add the new student or modify the existing student.</li> </ul>

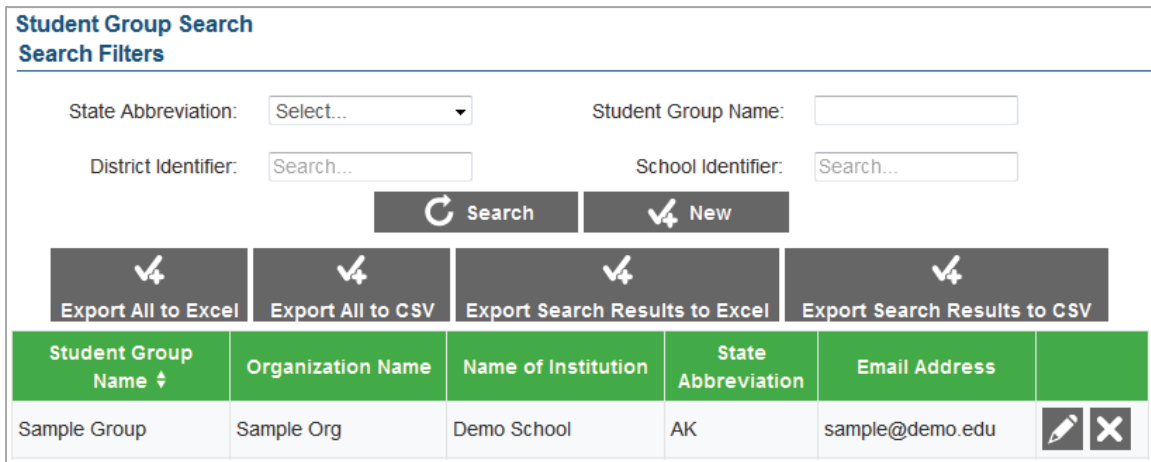
## Managing Student Groups.

After adding student records, you can group students together and associate them with personnel in student groups.

*Note: The actions described in this section are available to users with a client-, state-, district-, or school-level role.*

### Create or modify a student group.

Figure 28. Student Group Search Screen



Student Group Name	Organization Name	Name of Institution	State Abbreviation	Email Address
Sample Group	Sample Org	Demo School	AK	sample@demo.edu

To create a student group:

1. On the ART home screen, click **[Create/Modify Student Group]**.
2. On the **Student Group Search** screen, click **[New]**.
3. On the **Add Student Group Information** screen, enter the information for the student group in the provided fields. For an explanation of these fields, see [Table 17](#).
4. To add students to the group, do the following:
  - a. Enter any additional search criteria in the provided fields and click **[Search Students]**. At a minimum you must specify a state abbreviation, district identifier, and school identifier. Students who match those criteria appear in a table on the right side of the screen (see [Figure 29](#)).
  - b. Mark the checkbox next to each student you wish to add, or mark the *Check All* checkbox to select all of the students in the search results.
  - c. Click **[Add selected to group]**. The selected students will be added to the group and displayed in the student group table on the left.
  - d. To remove a student from the student group, mark the checkbox next to that student in the table on the left side of the screen and click **[Remove selected from group]**.
5. Click **[Save]**.

Figure 29. Add Student Group Information Screen

**Add Student Group Information** \* Indicates required field

\* Student Group Name:

\* State Abbreviation:

\* School Identifier:

First Name:

\* Email Address:

\* District Identifier:

Grades:

Last Name:

Student Identifier:

✓ Save
✗ Cancel
↻ Search Students

✗ Remove selected from group

Students in this group: 2


Select All	Student Identifier	First Name	Last Name	Grade
<input type="checkbox"/>	1	J	Smith	04
<input type="checkbox"/>	2	A	Smith	04

✓ Add selected to group


Total Students found: 7

Select All	Student Identifier	First Name	Last Name	Grade
<input checked="" type="checkbox"/>	1	J	Smith	04
<input checked="" type="checkbox"/>	2	A	Smith	04
<input type="checkbox"/>	3	C	Smith	05

To modify a student group:

1. Perform a search for a particular student group record on the **Student Group Search** screen.
2. On the search results table, click [  ] for a student group record.
3. On the **Edit Student Group Information** screen, modify the information for the student group in the provided fields. For an explanation of these fields, see [Table 17](#).
4. To add students to the group, do the following:
  - a. Enter any additional search criteria in the provided fields and click [ **Search Students** ]. At a minimum you must specify a state abbreviation, district identifier, and school identifier. Students who match those criteria appear in a table on the right side of the screen.
  - b. Mark the checkbox next to each student you wish to add, or mark the *Check All* checkbox to select all of the students in the search results.
  - c. Click [ **Add selected to group** ]. The selected students will be added to the group.
5. To remove a student from the student group, mark the checkbox next to that student in the table on the left side of the screen and click [ **Remove selected from group** ].
6. Click [ **Save** ].

To delete a student group:

1. Perform a search for a particular student record on the **Student Group Search** screen.
2. On the search results table, click [  ] for a student group record.
3. In the warning box that pops up, click [OK]. The student group will be removed from ART.

*Note: Deleting a student group deletes the student and personnel associations with that student group, but does not delete the individual student or personnel records.*

## Upload student groups.

You can add, modify, or delete student groups by uploading a file to ART. You can create multiple student groups and associate the same student to multiple groups within the same upload. A student group is created once a student is associated with a user (identified by that user's email address) in a row of the template. Each additional row that references that student group builds the group's membership.



If the user associated with a student group is removed from the group, the student group will continue to exist without a user association. In order to remove an entire student group via upload, you must remove every student's association with that group.

To upload a student group file:

1. Download the Student Group template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 17](#) as a reference, enter a row associating a student with a user (you. This creates the student group. Then, using the same student group name, enter a row of information for each additional student that should be added to that group. You can repeat this step with different student group names to create additional student groups.
  - a. To modify an existing student group, enter a row of information for the new record, including the student-student group association. The old record will be replaced upon uploading the file.
  - b. To delete an existing student group, enter "DELETE" in the Delete column for **every** student record associated with that group.
3. On the ART home screen, click [Upload Student Groups].
4. Upload the student group file, following the instructions provided in the [Uploading Files](#) section.

[Table 17](#) describes the columns in the student-group file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add Student Groups Information** screen. Columns marked with an asterisk (\*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 17. Upload Student-Group File Requirements

Column	Description
SchoolIdentifier**	Identifier for the school related to the student group. <b>Up to 20 alphanumeric characters of an existing school ID.</b>
ElectronicMailAddress*	Email address of the user designated as the “owner” of the Student Group. Email address must belong to a user in the system <b>Up to 50 characters in standard email address format.</b>
StudentGroupName**	Descriptive name of student group. <b>Up to 50 alphanumeric characters.</b>
StudentIdentifier**	State-assigned student identifier (SSID). <b>Up to 30 characters.</b>
StateAbbreviation**	State where the student group is located. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
ResponsibleDistrictIdentifier*	Identifier for the district related to the student-group. <b>Up to 30 alphanumeric characters of an existing district ID.</b>
Delete+	Flag for deleting the student group-student pair. <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the student group-student pair associated with the combination of SchoolIdentifier, StudentGroupName, StudentIdentifier, and StateAbbreviation.</li> <li>• <b>&lt;blank&gt;</b>—Add the new student group or modify an existing student group.</li> </ul>

## Managing Student Eligibility.

If you defined an assessment with explicit eligibility, then you must upload a file containing the students eligible for that assessment. You cannot use the eligibility upload task to register students for assessments with implicit eligibility.

A list of the tests for which a student is eligible appears on the **Edit Student Information** screen, which can be accessed from the **Create/Modify Students** feature (for more information, see the section [Create or modify a student](#)).

*Note: The actions described in this section are available to users with a client-, state-, district-, or school-level role.*

Figure 30. Eligible Assessments section on the Edit Student Information Screen

Eligible Assessments		
Test Name	Version	Subject Code
TEST ENGLISH	1.0	ENGLISH 010
CC-MAT-7-ADMIN-I-1	1.1	MAT



You cannot manage a student's eligibility from the **Create/Modify Students** screen. The only way to add, modify, or delete a student's eligibility for an explicit assessment is to upload a student eligibility file. Eligibility rules for assessments with implicit eligibility must be edited on the **Add/Modify Test Information** screen.

*To upload a student eligibility file:*

1. Download the *Eligibility* template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 18](#) as a reference, enter information for each eligibility record you want to add.
  - To register a student to multiple assessments, add a row for each student-assessment pair.
3. To delete an existing student eligibility record, enter "DELETE" in the Delete column.
4. To modify a student eligibility record, do the following:
  - a. Delete the original record in one row.
  - b. Enter the information for the new eligibility record in a new row.
5. On the ART home screen, click [**Upload Student Eligibility**].
6. Upload the student eligibility file, following the instructions provided in the [Uploading Files](#) section.

[Table 18](#) describes the columns in the student eligibility file and lists acceptable values in **bold type**. Columns marked with an asterisk (\*) are required for add actions; columns marked with a plus (+) are required for delete actions.

Table 18. Upload Student Eligibility File Requirements

Column	Description
StudentIdentifier**	State-assigned student identifier (SSID). <b>Up to 30 characters.</b>
AssessmentAdministrationAssessmentFamily*	An identifier for the test administration program. <b>Up to 60 characters.</b>

Column	Description
StateAbbreviation**	State with which the student eligibility is associated. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• AA—Armed Forces Americas</li> <li>• AE—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• AP—Armed Forces Pacific</li> <li>• TS—Test State</li> <li>• OT—Other</li> </ul>
ResponsibleDistrictIdentifier*	Identifier for the district related to the student eligibility. <b>Up to 30 alphanumeric characters of an existing district ID.</b>
Subject*	The subject of the assessment the student is eligible to take. <b>Up to 20 characters.</b>
TestName**	The specific name of the assessment the student is eligible to take. <b>Up to 200 characters.</b>
TestVersion**	Part of the unique key to identify a particular assessment. <b>Up to 50 characters.</b>
TestForm	The specific name of the form assigned to the student. <b>Up to 50 characters.</b>
Delete+	Flag for deleting the student eligibility. <ul style="list-style-type: none"> <li>• <b>DELETE</b>—Delete the eligibility associated with the combination of StudentIdentifier, StateAbbreviation, TestName, and TestVersion.</li> <li>• <b>&lt;blank&gt;</b>—Add the new student-eligibility pair, or modify the existing student-eligibility pair.</li> </ul>

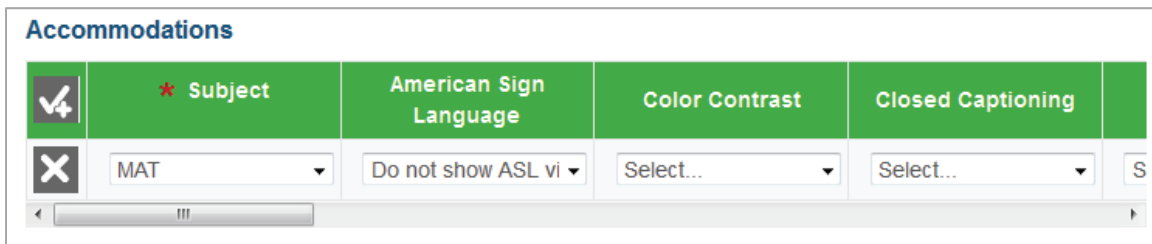
## Managing Accommodations.

If a student requires test accommodations in a particular subject, you can create and manage these accommodations on the **Create/Modify Students** screen. You can also add accommodations for multiple students and subjects via the file upload task, but you cannot use the upload task to delete existing accommodations.

*Note: The actions described in this section are available to users with a client-, state-, district-, or school-level role.*




### Create or modify a student's accommodations.

Figure 31. Accommodations section on the Edit Student Information Screen





To create, modify, or delete a student's accommodations:

1. In ART, click [**Create/Modify Students**]. The **Student Search** screen appears.
2. On the **Student Search** screen, search for a particular student record.
3. On the search results table, click [  ] for a student record. The **Edit Student Information** screen appears, displaying the student's accommodations in the *Accommodations* section near the bottom of the screen (see [Figure 31](#)).
4. To add an accommodation for the student, do the following:
  - a. Click [  ] in the *Accommodations* section. A new row of blank accommodation fields and drop-down menus will appear.
  - b. Enter the accommodation information in the provided fields. For a description of these fields, refer to [Table 19](#).
  - c. Repeat steps [a](#)–[b](#) to add additional accommodations.
5. To edit an existing accommodation, select different values from the fields provided for that accommodation in the *Accommodations* section.
6. To delete an accommodation, click [  ] next to that accommodation.
7. Click [**Save**].

## Upload accommodations.

Use this task to add or modify accommodations. You cannot delete accommodations using file uploads. To delete an accommodation, you must use the **Edit Student Information** screen.

To upload an accommodations file:

1. Download the *Accommodations* template, following the instructions provided in the [Download File Templates](#) section.
2. Using [Table 19](#) as a reference, enter a row of information for each accommodation you want to add or update.
  - To add accommodations for multiple subjects for a single student, enter a row of accommodations for each subject.
  - To update an existing accommodation record for a student, enter a new row of information for that record. Once uploaded, the new accommodation record will replace the previous one.
3. On the ART home screen, click [**Upload Student Institutions, Users and Students**].
4. Upload the student accommodation file, following the instructions provided in the [Uploading Files](#) section.

# Administration and Registration Tools User Guide

Table 19 describes the columns in the accommodations file, and lists acceptable values in **bold type**. These columns also correspond with the fields on the *Edit Student Information* screen. Columns marked with an asterisk (\*) are required for add actions.

Table 19. Upload Accommodation File Requirements

Column	Description
StudentIdentifier*	State-assigned student identifier (SSID). <b>Up to 30 characters.</b>
StateAbbreviation*	State in which the student attends school. <b>Any standard two-letter state abbreviation is valid.</b> In addition, the following are also valid: <ul style="list-style-type: none"> <li>• <b>AA</b>—Armed Forces Americas</li> <li>• <b>AE</b>—Armed Forces Africa, Canada, Europe and Mideast</li> <li>• <b>AP</b>—Armed Forces Pacific</li> <li>• <b>TS</b>—Test State</li> <li>• <b>OT</b>—Other</li> </ul>
Subject*	Subject for which the accommodations apply. <b>Up to 20 characters.</b>
AmericanSignLanguage	Allows students to view test content translated into ASL by a human signer. <ul style="list-style-type: none"> <li>• <b>TDS_ASLO</b> – Do not show ASL videos.</li> <li>• <b>TDS_ASL1</b> – Show ASL videos.</li> </ul>
ColorContrast	By default, tests are presented with black text on a white background. Students who require a different combination of text and background are assigned one of the following: <ul style="list-style-type: none"> <li>• <b>TDS_CCO</b> – Black on White</li> <li>• <b>TDS_CCInvert</b> – Reverse Contrast</li> <li>• <b>TDS_CCMagenta</b> – Black on Rose</li> <li>• <b>TDS_CCMedGrayLtGray</b> – Medium Gray on Light Gray</li> <li>• <b>TDS_CCYellowB</b> – Yellow on Blue</li> </ul>
ClosedCaptioning	Provides subtitles for audio portions. <ul style="list-style-type: none"> <li>• <b>TDS_ClosedCap0</b> – Closed captioning not available</li> <li>• <b>TDS_ClosedCap1</b> – Closed captioning available</li> </ul>
Language	Language in which the tests are presented. <ul style="list-style-type: none"> <li>• <b>ENU</b> – English</li> <li>• <b>ENU-Braille</b> – Braille</li> <li>• <b>ESN</b> – Spanish (stacked translation), math only</li> </ul>
Masking	Blocks off content that is not of immediate need or that may be distracting to the student. <ul style="list-style-type: none"> <li>• <b>TDS_Masking0</b> – Masking not available</li> <li>• <b>TDS_Masking1</b> – Masking available</li> </ul>

# Administration and Registration Tools User Guide

Column	Description
PermissiveMode	<p>Permissive mode enables access to accessibility software in order to interact with the test (e.g., screen readers, magnifiers). When permissive mode is disabled, the only application that can be open on the computer is the secure browser.</p> <ul style="list-style-type: none"> <li>• <b>TDS_PMO</b> – Permissive mode disabled</li> <li>• <b>TDS_PM1</b> – Permissive mode enabled</li> </ul>
PrintOnDemand	<p>Allows student to request printing of stimuli.</p> <ul style="list-style-type: none"> <li>• <b>TDS_PoDO</b> – None</li> <li>• <b>TDS_PoD_Stim</b> – Stimuli</li> </ul> <p><i>Note: If a student will require items to be printed, contact the Smarter Balanced Help Desk at ETS and provide the student's state, SSID, and the reason for the request.</i></p>
PrintSize	<p>Sets print size the student views when starting a test. The selected print size becomes the default for all items in that student's test.</p> <ul style="list-style-type: none"> <li>• <b>TDS_PS_L0</b> - No default zoom applied</li> <li>• <b>TDS_PS_L1</b> - Level 1</li> <li>• <b>TDS_PS_L2</b> - Level 2</li> <li>• <b>TDS_PS_L3</b> - Level 3</li> <li>• <b>TDS_PS_L4</b> - Level 4</li> </ul> <p>The default typeface is as follows:</p> <ul style="list-style-type: none"> <li>• The default print size for all tests is 14 pt.</li> <li>• The default font for ELA tests is Times New Roman.</li> <li>• The default font for mathematics tests is Verdana.</li> </ul>
StreamlinedInterface	<p>By default, all tests use the standard interface. This interface is compatible with all supported desktops and tablets.</p> <p>The streamlined interface presents the test in an alternative, simplified format in which the items are displayed below the stimuli. All tool and navigation buttons are on the bottom of the screen.</p> <p>The streamlined interface is not intended to be tablet compatible.</p> <ul style="list-style-type: none"> <li>• <b>TDS_TS_Modern</b> – Standard</li> <li>• <b>TDS_TS_Accessibility</b> – Streamlined</li> </ul>
TexttoSpeech	<p>Sets student's text-to-speech accommodation. Students with this test setting enabled may listen to the read-aloud of the items or stimuli in the assessment. (Text-to-Speech is not available in Spanish.)</p> <ul style="list-style-type: none"> <li>• <b>TDS_TTS0</b> – None</li> <li>• <b>TDS_TTS_Item</b> – Items Only (ELA only)</li> <li>• <b>TDS_TTS_Stim</b> – Stimuli Only (ELA only)</li> <li>• <b>TDS_TTS_Stim&amp;TDS_TTS_Item</b> – Stimuli and Items</li> </ul>

# Administration and Registration Tools User Guide

Column	Description
Translation	<p>Sets student's glossary accommodation.</p> <p>Students can open a glossary to view terms presented in the test that may be unfamiliar to them.</p> <p>By design, all students can access the English glossary word list as a universal tool, unless this field is set to "TDS_WLO" (none) or overridden by another language.</p> <ul style="list-style-type: none"> <li>• If a combination glossary is selected (e.g., English and Arabic or English and Russian), then the student has access to both.</li> <li>• If a single glossary is selected (e.g., Mandarin), then the student has access to only that glossary. The English glossary is not available.</li> </ul> <p>The English glossary is available for both ELA and mathematics tests. Translated glossaries are available for mathematics tests only.</p> <ul style="list-style-type: none"> <li>• <b>TDS_WL_Glossary</b> – English</li> <li>• <b>TDS_WL_ArabicGloss</b> (Math only) – Arabic</li> <li>• <b>TDS_WL_CantoneseGloss</b> (Math only) – Cantonese</li> <li>• <b>TDS_WL_ESNGlossary</b> (Math only) – Spanish</li> <li>• <b>TDS_WL_KoreanGloss</b> (Math only) – Korean</li> <li>• <b>TDS_WL_MandarinGloss</b> (Math only) – Mandarin</li> <li>• <b>TDS_WL_PunjabiGloss</b> (Math only) – Punjabi</li> <li>• <b>TDS_WL_RussianGloss</b> (Math only) – Russian</li> <li>• <b>TDS_WL_TagalGloss</b> (Math only) – Filipino</li> <li>• <b>TDS_WL_UkrainianGloss</b> (Math only) – Ukrainian</li> <li>• <b>TDS_WL_VietnameseGloss</b> (Math only) – Vietnamese</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_ArabicGloss</b> (Math only) – English &amp; Arabic</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_CantoneseGloss</b> (Math only) – English &amp; Cantonese</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_ESNGlossary</b> (Math only) – English &amp; Spanish</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_KoreanGloss</b> (Math only) – English &amp; Korean</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_MandarinGloss</b> (Math only) – English &amp; Mandarin</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_PunjabiGloss</b> (Math only) – English &amp; Punjabi</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_RussianGloss</b> (Math only) – English &amp; Russian</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_TagalGloss</b> (Math only) – English &amp; Filipino</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_UkrainianGloss</b> (Math only) – English &amp; Ukrainian</li> <li>• <b>TDS_WL_Glossary&amp;TDS_WL_VietnameseGloss</b> (Math only) – English &amp; Vietnamese</li> <li>• <b>TDS_WLO</b> – None</li> </ul>

# Administration and Registration Tools User Guide

Column	Description
NonEmbeddedDesignatedSupports	<p>Some non-embedded designated supports may need to be provided to students during testing. These should be provided only to those students who are unable to use the embedded test settings.</p> <p>Non-Embedded Designated Supports for ELA:</p> <ul style="list-style-type: none"> <li>• <b>NEDS0</b> – None</li> <li>• <b>NEDS_BD</b> – Bilingual Dictionary</li> <li>• <b>NEDS_CC</b> – Color Contrast</li> <li>• <b>NEDS_CO</b> – Color Overlay</li> <li>• <b>NEDS_Mag</b> – Magnification</li> <li>• <b>NEDS_RA_Items</b> – Read Aloud Items</li> <li>• <b>NEDS_SC_Items</b> – Scribe Items (Non-Writing)</li> <li>• <b>NEDS_SS</b> – Separate Setting</li> </ul> <p>Non-Embedded Designated Supports for Math:</p> <ul style="list-style-type: none"> <li>• <b>NEDS0</b> – None</li> <li>• <b>NEDS_CC</b> – Color Contrast</li> <li>• <b>NEDS_CO</b> – Color Overlay</li> <li>• <b>NEDS_Mag</b> – Magnification</li> <li>• <b>NEDS_RA_Items</b> – Read Aloud Items</li> <li>• <b>NEDS_SC_Items</b> – Scribe Items (Non-Writing)</li> <li>• <b>NEDS_SS</b> – Separate Setting</li> <li>• <b>NEDS_TArabic</b> – Arabic Glossary</li> <li>• <b>NEDS_TCantonese</b> – Cantonese Glossary</li> <li>• <b>NEDS_TFilipino</b> – Filipino Glossary</li> <li>• <b>NEDS_TKorean</b> – Korean Glossary</li> <li>• <b>NEDS_TMandarin</b> – Mandarin Glossary</li> <li>• <b>NEDS_TPunjabi</b> – Punjabi Glossary</li> <li>• <b>NEDS_TRussian</b> – Russian Glossary</li> <li>• <b>NEDS_TSpanish</b> – Spanish Glossary</li> <li>• <b>NEDS_TUkrainian</b> – Ukrainian Glossary</li> <li>• <b>NEDS_TVietnamese</b> – Vietnamese Glossary</li> </ul>

# Administration and Registration Tools User Guide

Column	Description
NonEmbeddedAccommodations	<p>Some accommodations may need to be provided to students during testing. These should be provided only to those students who are unable to use the embedded test accommodations.</p> <ul style="list-style-type: none"> <li>• <b>NEAO</b> – None</li> <li>• <b>NEA_AR</b> – Alternate Response Options</li> <li>• <b>NEA_RA_Stimuli</b> (ELA only) – Read Aloud Stimuli</li> <li>• <b>NEA_SC_WritItems</b> (ELA only) – Scribe Items (Writing)</li> <li>• <b>NEA_STT</b> – Speech-to-Text</li> <li>• <b>NEA_Abacus</b> (Math only) – Abacus</li> <li>• <b>NEA_Calc</b> (Math only) – Calculator</li> <li>• <b>NEA_MT</b> (Math only) – Multiplication Table</li> </ul>
Other	<p>Other designated supports or accommodations that are not listed here.</p> <p><b>Up to 300 characters.</b></p>

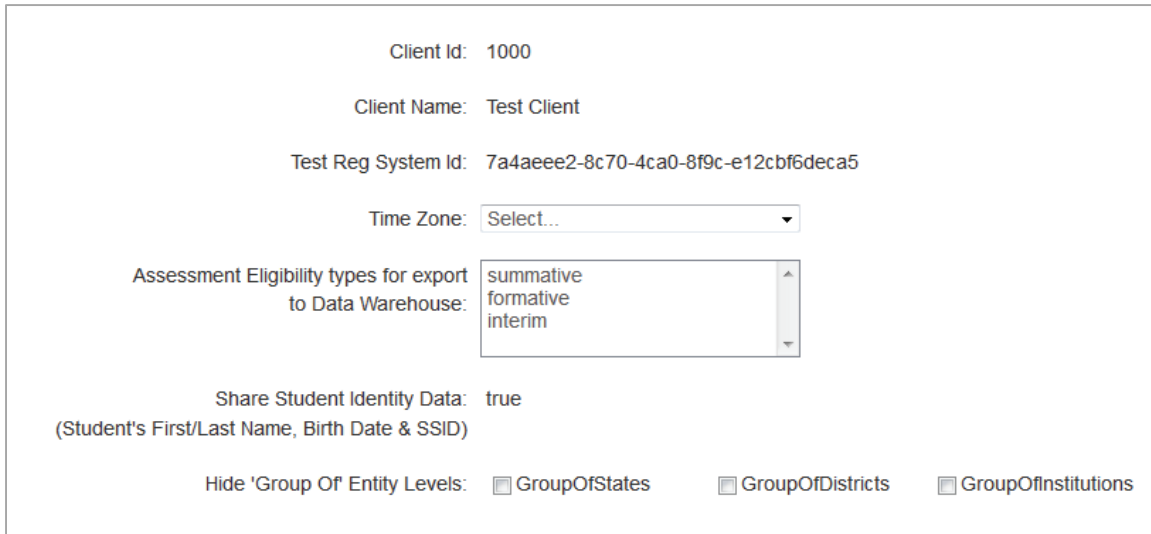
## APPENDIX A. MANAGE SYSTEM SETTINGS

Depending on your user role, the Settings drop-down list in the ART banner allows you to configure client settings and manage subjects.

### Client Configuration

The **Client Configuration** screen allows you to configure system settings that affect how ART appears and processes registrations. For a description of the fields on this screen, see [Table 20](#).

Figure 32. Client Configuration Screen



Client Id: 1000

Client Name: Test Client

Test Reg System Id: 7a4aeec2-8c70-4ca0-8f9c-e12cbf6deca5

Time Zone: Select...

Assessment Eligibility types for export to Data Warehouse: summative, formative, interim

Share Student Identity Data: true  
(Student's First/Last Name, Birth Date & SSID)

Hide 'Group Of' Entity Levels: ☐ GroupOfStates ☐ GroupOfDistricts ☐ GroupOfInstitutions

To configure system settings:

- In the ART banner, select "Client Configuration" from the *Settings* drop-down list.
  - To change the time zone, select a value from the *Time Zone* drop-down list.
  - To indicate the type of assessments to deliver, select one or more options from the *Assessment Eligibility types for export to Data Warehouse* drop-down list.
  - To indicate a preference for sharing student data with the Smarter Balanced data warehouse, mark or clear the *Share Student Identity Data* checkbox.
  - To show or hide the grouping options for states, districts, or institutions, mark or clear the appropriate checkboxes.
- Click **[Save]**.

[Table 20](#) describes the fields on the **Client Information** screen.

Table 20. Key Icons and Elements

Field	Description
<b>Client ID</b>	Unique identifier for the client you belong to.
<b>Client Name</b>	Name of the client that you belong to.
<b>Time Zone</b>	Time zone used to consider the end of a day and the beginning of the next day. For information about the impact of time zones on test windows, see the section <a href="#">Understanding test windows and time zones</a> .
<b>Test Reg System ID</b>	Unique system ID among all ART deployments.
<b>Assessment Eligibility types for export to Data Warehouse</b>	Indicates which assessments TDS delivers during the test window. For example, if you select only “summative,” then TDS delivers only summative assessments during the test window. If you select “summative” and “formative,” TDS delivers both summative and formative assessments during the test window.
<b>Share Student Identity Data</b>	If set to “True,” ART stores each student’s first name, last name, birth date, and SSID in the Smart Balanced data warehouse. If set to “False,” ART stores only each student’s External SIS number in the Smart Balanced data warehouse.
<b>Hide Group Of Entity Levels</b>	If checked, the corresponding grouping does not appear in the user interface for the current tenant. For example, if you mark the <i>Group Of Districts</i> checkbox, and your tenancy is Wisconsin, then all users in the Wisconsin tenancy cannot view, add, modify, or delete district groups.

## Manage Subjects

The **Subject Search** screen allows you to search for, add, modify, delete, and merge subjects that may be associated with assessments. You cannot modify, delete, or merge any subjects that are already associated with an assessment in ART.

The table on this screen displays the subject codes you add to ART. You can use the **Subject Code** field and the **[Search]** button to filter the table information to a specified subject.







Figure 33. Subjects Table

**Subject Search**  
**Search Filters**

Subject Code:

↻ Search

✓ New

Subject Code ↕	
ELA	  
MTH	  

Total results found: 3

Page: 1



To access the **Manage Subjects** screen:

1. In the ART banner, select “Manage Subjects” from the *Settings* drop-down list.

Figure 34. Add Subject Information Screen




The screenshot shows a form titled "Add Subject Information". At the top right, there is a red asterisk and the text "Indicates required field". Below the title, there is a label "\* Subject Code:" followed by a text input field containing the value "ALG". At the bottom of the form, there are two buttons: a "Save" button with a green checkmark icon and a "Cancel" button with a red X icon.

To add a subject:

1. On the **Subject Search** screen, click [New]. The **Add Subject Information** screen loads.
2. In the **Subject Code** field, enter the code for the new subject.
3. Click [Save]. The new subject code displays on the **Subjects** table.

To modify a subject:

1. On the **Subjects** table, click [Edit Subject Information screen loads.
2. In the **Subject Code** field, modify the code for the subject.
3. Click [Save]. The modified subject code displays on the search results table.

To delete a subject:



1. In the search results table, click [- 2. In the warning box that pops up, click [OK].

Figure 35. Merge Subject Screen



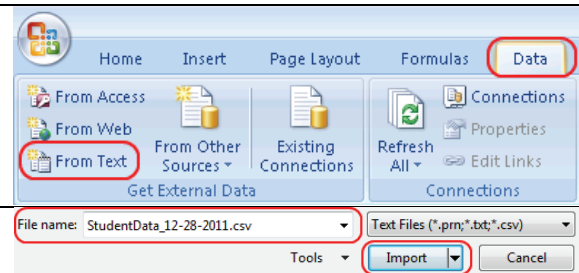
The screenshot shows a form titled "Merge Subject Screen". It has two fields: "Original Subject: ALG" and "\* New Subject:" followed by a dropdown menu. At the bottom, there are two buttons: a "Merge" button with a green checkmark icon and a "Cancel" button with a red X icon.

To merge a subject with a new subject:

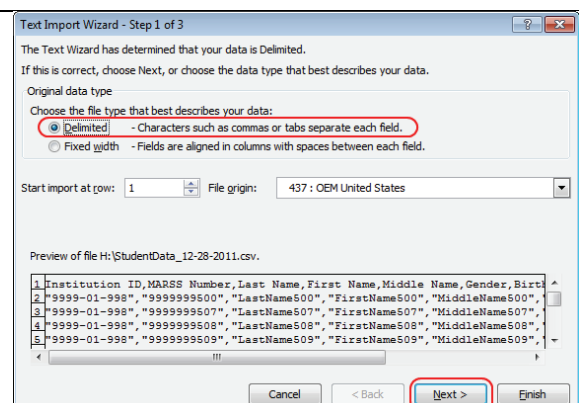
1. On the **Subjects** table, click [Merge Subject screen loads.
2. From the **New Subject Code** drop-down list, select the new subject with which to merge.
3. Click [Merge]. The original subject merges with the new subject.

## APPENDIX B. OPENING A CSV FILE IN EXCEL

1. Open Microsoft Excel, and click the [Data] menu tab.
2. In the Data menu, click the “From Text” icon. The Import Text File dialog window will open.



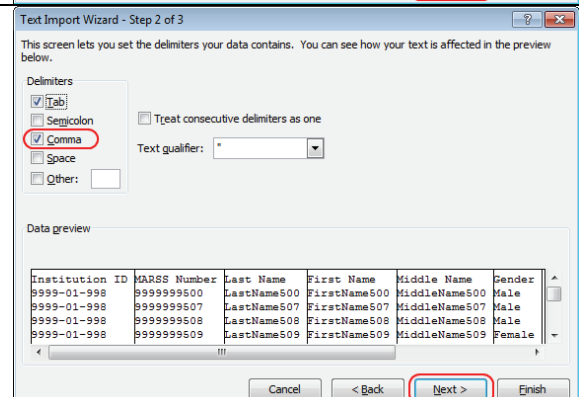
3. Navigate to the location where you saved the file. Select the file and then click [Import].
4. The Text Import Wizard window will open. You will have to navigate through three steps:



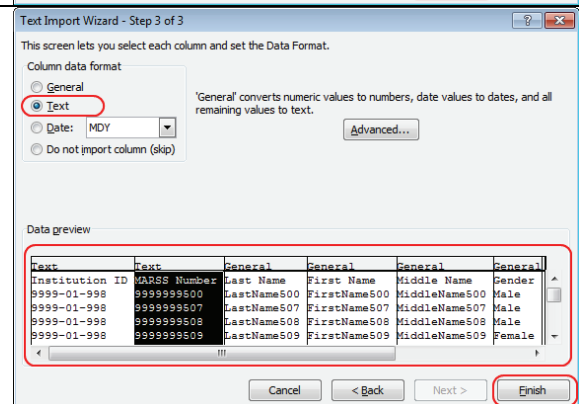
- a. **Step 1:** Make sure “Delimited” is selected, and click [Next].

*Note: This window also has a preview of the data in the file you selected. This allows you to verify that you selected the correct file.*

- b. **Step 2:** Click the check box next to “Comma” and click [Next].



- c. **Step 3:** Format numerical data as text.
2. In the Data Preview section, click a column. (The selected column will have a black background.)
  3. In the Column Data Format section, click the radio button next to “Text.”
  4. Repeat for each column.
- d. Click [Finish]. The data should populate in separate columns in Excel.



## APPENDIX C. COMMON ERRORS WITH FILE UPLOADS

For upload tasks, common errors can prevent records from being added or modified correctly.

### File Validation


ART “screens” each file to check for any errors in the file. This section will display any errors that exist in the file you uploaded. If your file has no errors, you will see “Your file has successfully been saved.” This message indicates that the file was uploaded successfully and contains no errors. (The file has not yet been committed to ART.) *Records without errors will be automatically accepted by the system.*

### If your file has errors

Files with data *not in the correct format* as shown in the template will generate error messages by row, identifying the errors by line (row) for each invalid record in the file.

Some errors will prevent a record from uploading (e.g., invalid parent entity). A table of validation messages will appear and contains information about the errors. *Note: It is possible for a single record to have multiple errors.*


Figure 36. Sample Error Message

	Record Number	Field Name	Field Value	Validation Message
	3	NCESLEAID	999	NCESLEAID already exists in DB and cannot be added


- **Record #:** The row in the file in which the error appeared
- **Field Name:** The column name that contains the error
- **Field Value:** The text that you entered in the cell
- **Validation Message:** A brief description of the error

Depending on the severity of the error(s), one of the following will occur:


- The file will fail to upload.
- The file will upload, but ART will exclude the record(s) that had errors.
- The file will upload, and ART will accept the record(s) that had errors. (These records will need to be fixed in ART or uploaded in a new file.)



Error(s) of this type will cause the entire file upload to fail. Click Cancel, update your file and restart the upload process.



File can be saved but records with this type of error will not be included. You may elect to fix the errors and re upload the file or add these records later using the administration option to manage this type of file records.



These are warnings. File can be saved. However, you are strongly encouraged to review the associated records. You may edit these records using the administration option to manage this type of file records.

If your file included errors, you have two options:

- **Abort the upload.** Click [**Cancel**], and then click [**OK**]. You can then make edits to the upload file, save it, and begin the upload process again.
- **Proceed with the upload, and add the information to ART.** To do so, click [**Save**]. Only error-free records or records with acceptable errors (rows in yellow) will be uploaded to the system.

**These are some common errors:**

- Having blank rows between records
- Inserting invalid characters (refer to appropriate user guide sections for information about accepted formats)
- Uploading a file that contains parent entities that do not already exist in ART.
- Uploading a file for students or personnel in an institution or district with which you are not associated.